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.

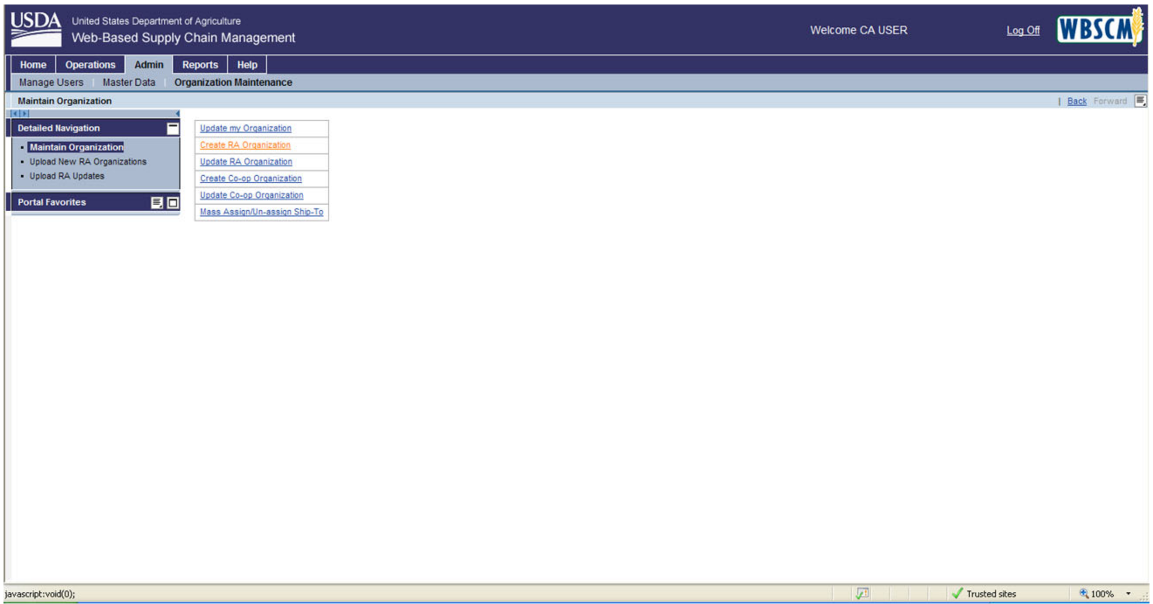
Reminders

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

PROCEDURE

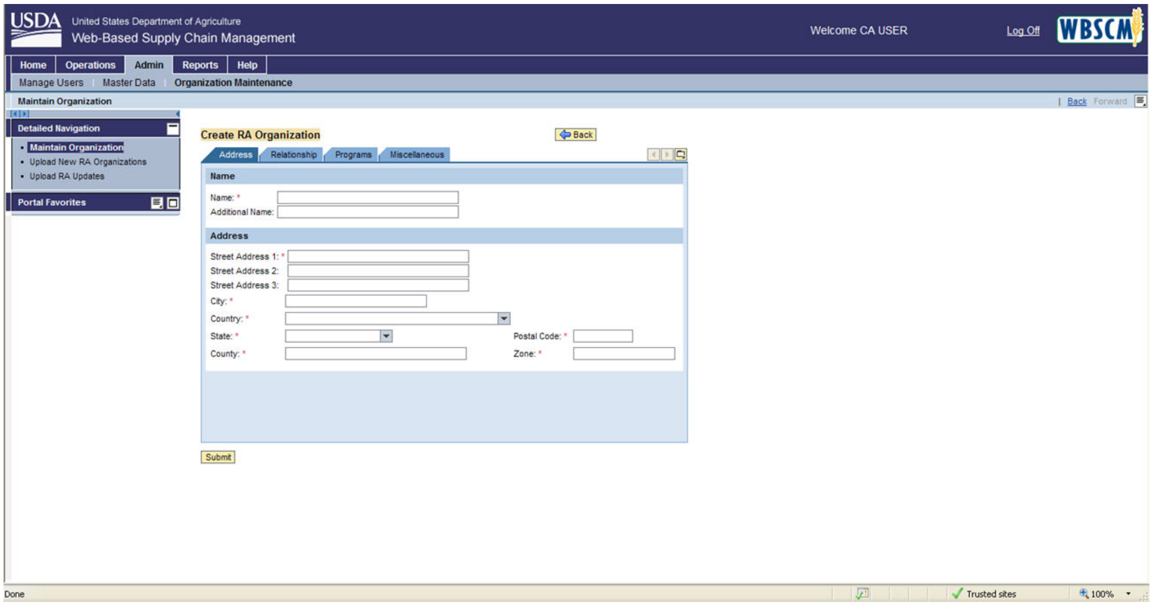
1. Start the transaction using the Portal path. Select **Admin** tab ➔ **Organization Maintenance** folder ➔ **Maintain Organization** link ➔ **Create RA Organization**

Maintain Organization Screen



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

Create RA Organization Screen



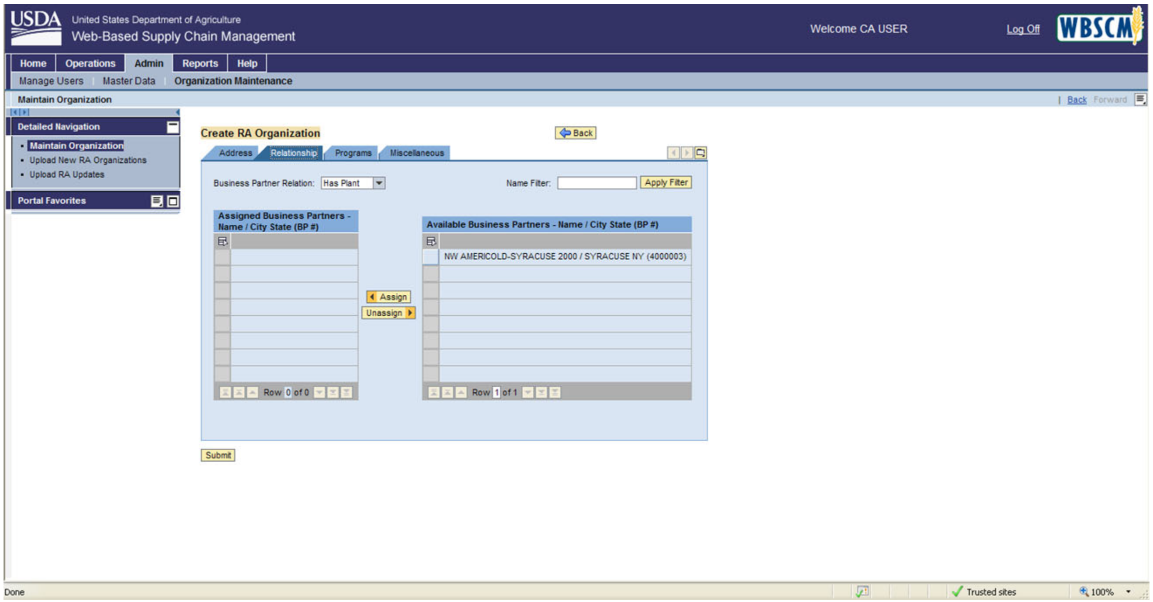
3. In the **Name** field, click (the **text box**) to enter name of the RA.

(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.

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

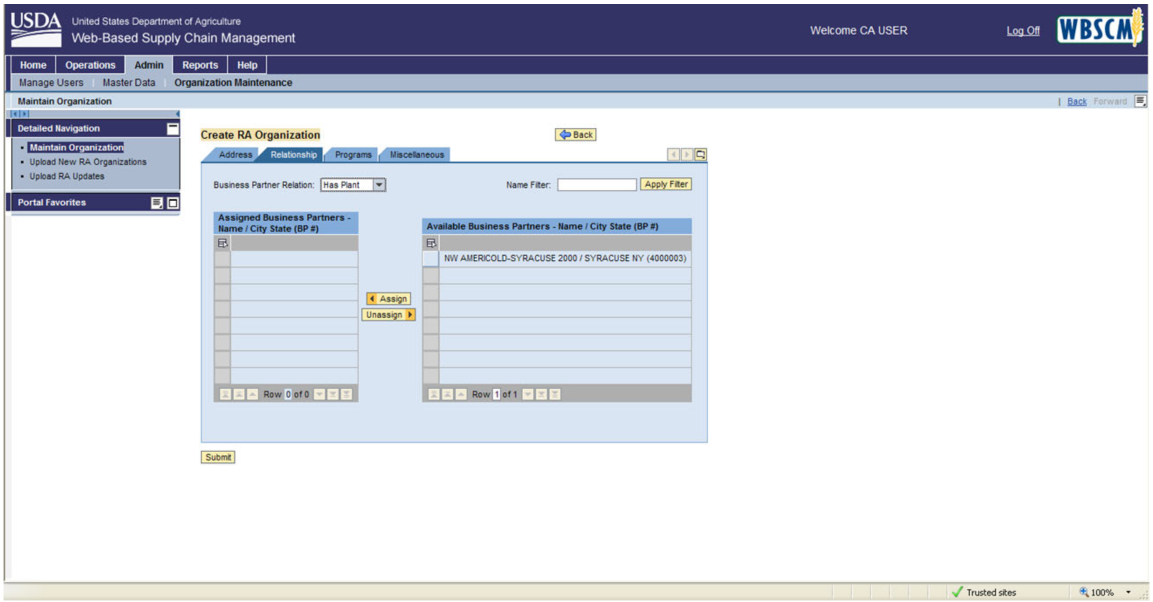
Field	R/O/C	Description
Name: *	R	Name of the Recipient Agency Organization **Example:** Riverside RA
Street Address 1: *	R	Street address of the RA's headquarters **Example:**1111 Riverside Dr.
City: *	R	City of the RA's headquarters **Example:** Riverdale
Country: *	R	Name of the country where the RA is located. Typically, USA unless it is a domestic offshore location. **Example:** USA
State:*	R	State where RA is located. **Example:** California
Postal Code:*	R	A zip code for the RA's location **Example:** 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. **Example:** 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

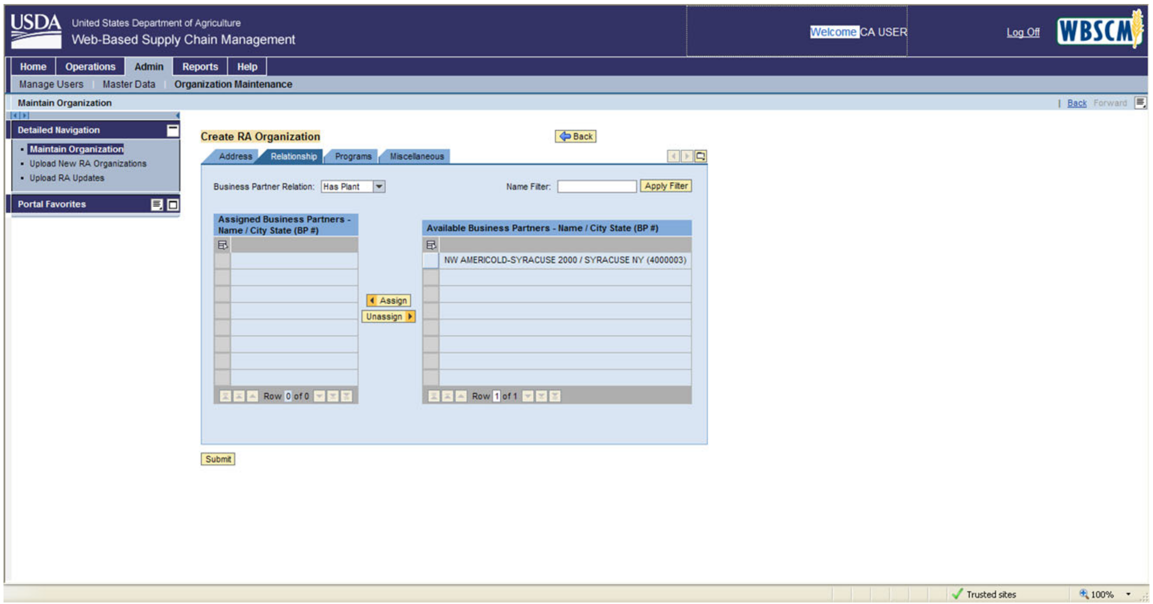


6. In the **Business Partner Relation** field, click (the **Dropdown** button) to begin maintaining the business partner relations for the RA.

(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.

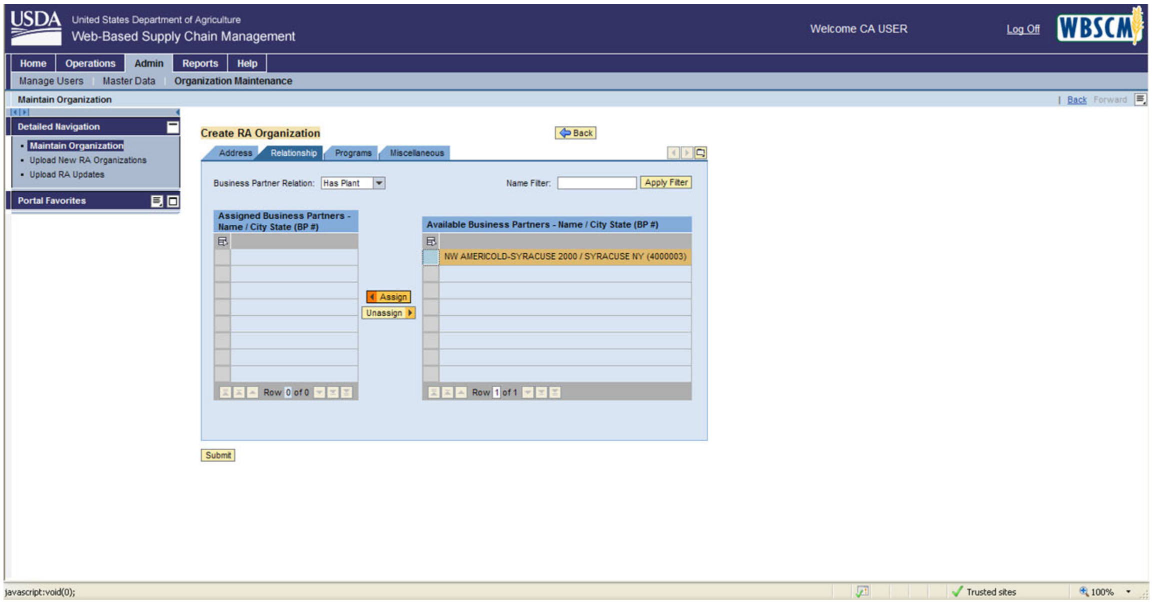
Select the **Has Ship-To** to choose the option when the business partner has a Ship-To location that needs to be added. This could include any delivery locations for goods. By adding this information, the new Ship-To address will be selectable when the RA is creating a requisition and needs to choose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

Create RA Organization Screen



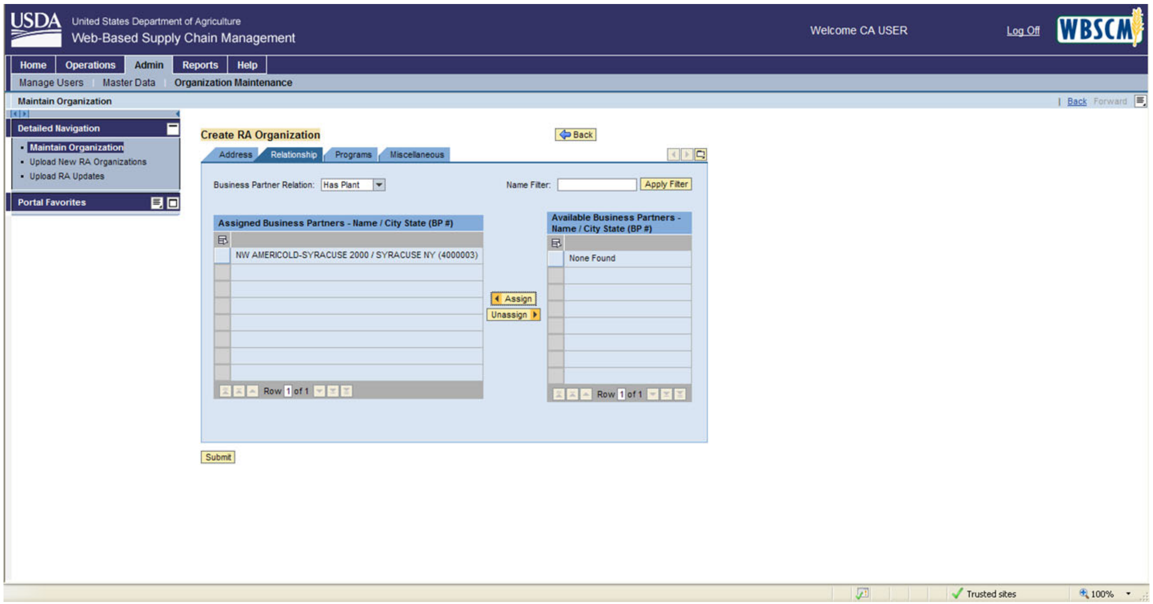
7. Highlight the name of the business partner from the *Available Business Partners* column by clicking (the **Blue Box**).

Create RA Organization Screen



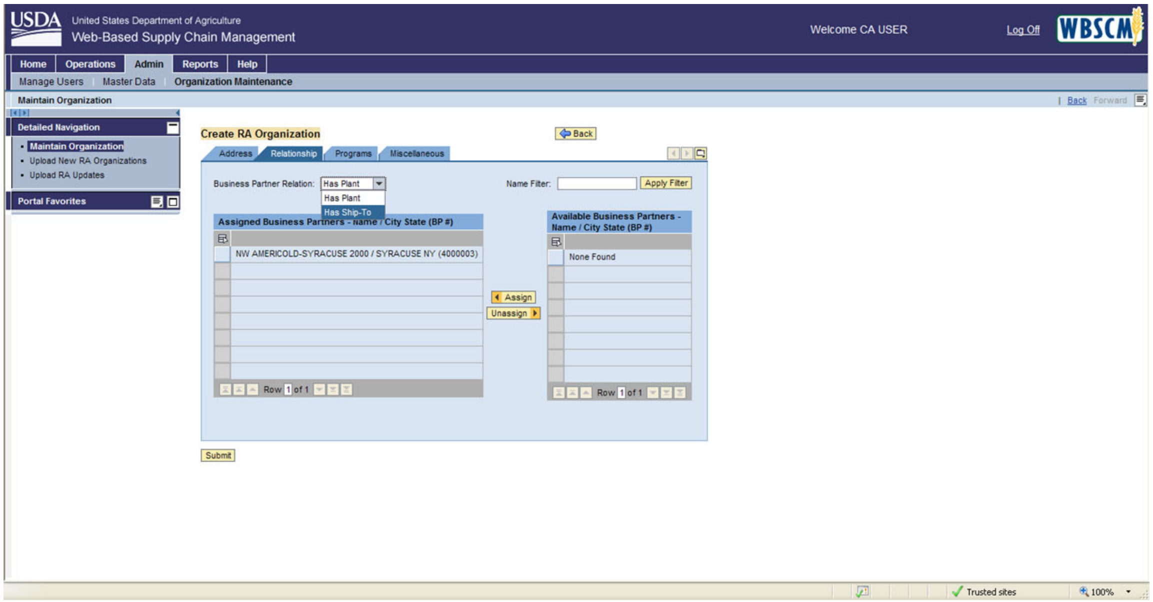
8. Click Assign (the **Assign** button) to assign your selection to the RA.

Create RA Organization Screen



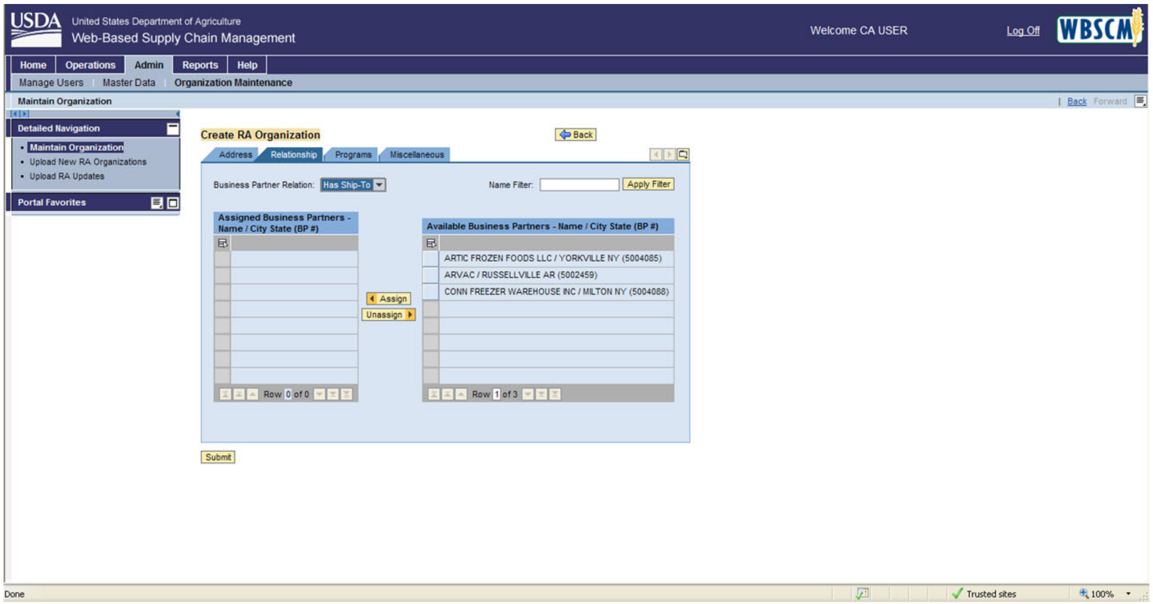
9. In the *Business Partner Relation* field, click (the **Dropdown** button) to maintain the business partner relations for the RA.

Create RA Organization Screen



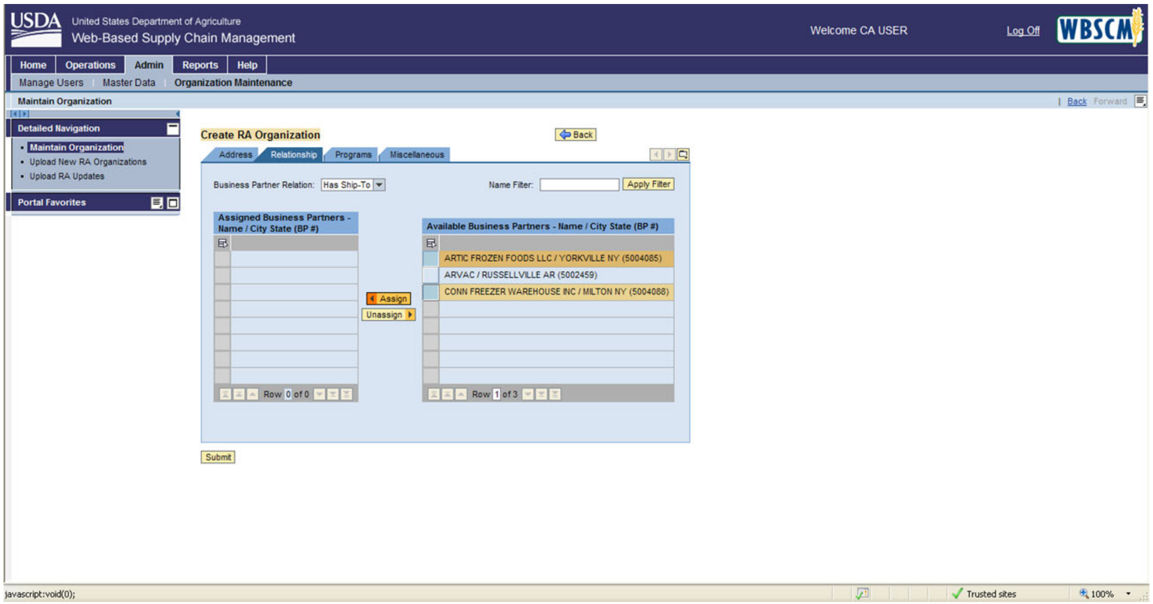
10. Click Has Ship-To (the **HasShip-To** option) to select Ship-To locations to assign to the RA.

Create RA Organization Screen



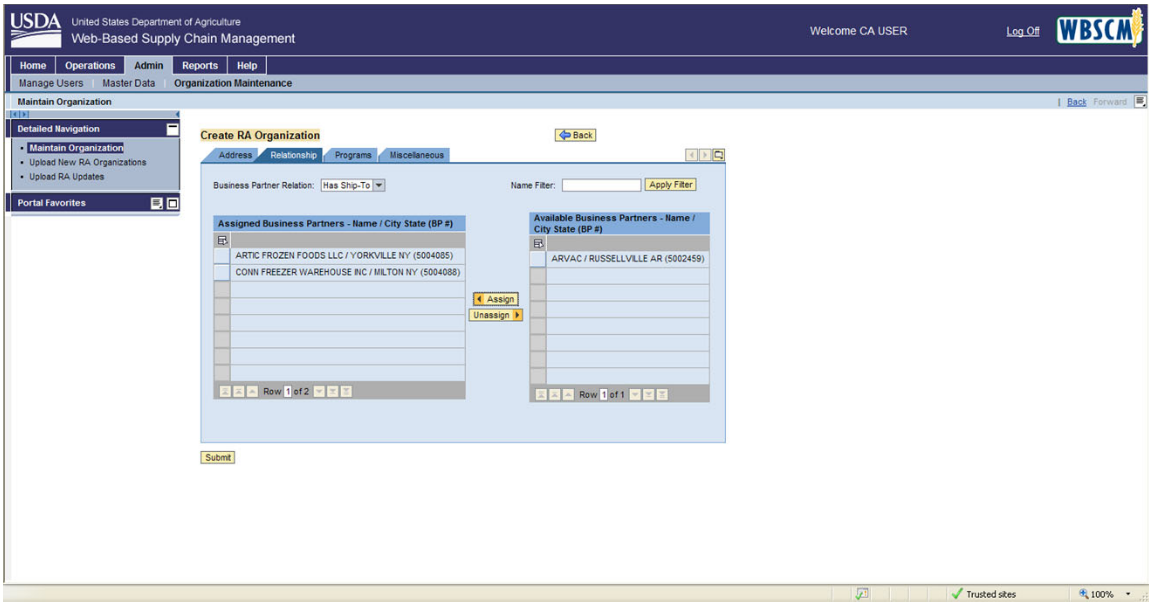
11. Click (the **Blue Box**) to select the Ship-To locations.

Create RA Organization Screen



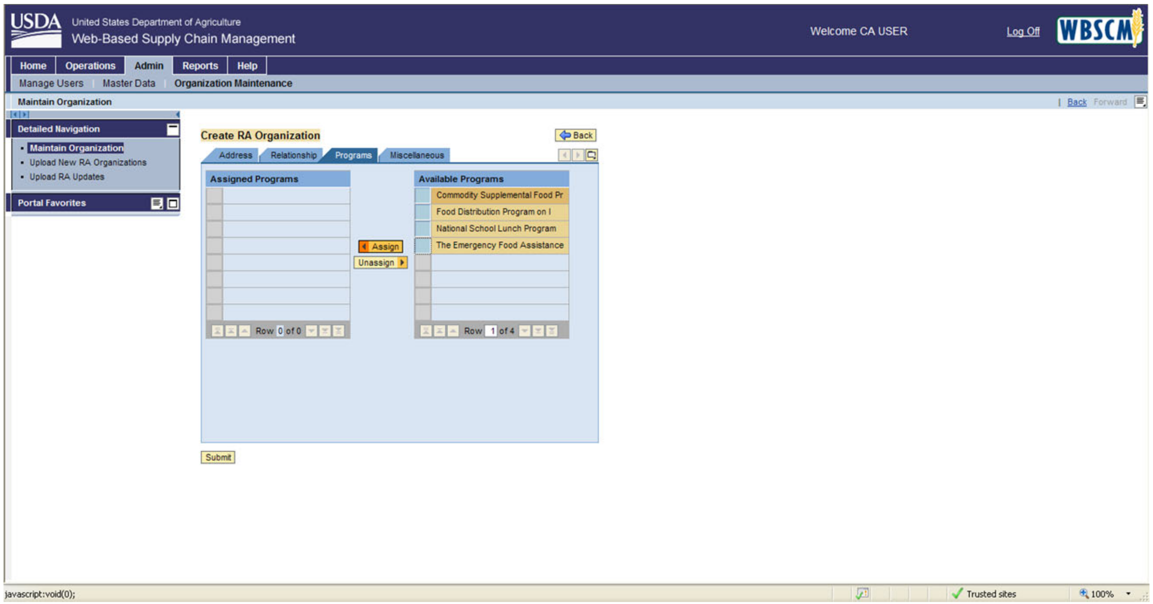
12. Click Assign (the **Assign** button) to assign your selection to the RA.

Create RA Organization Screen



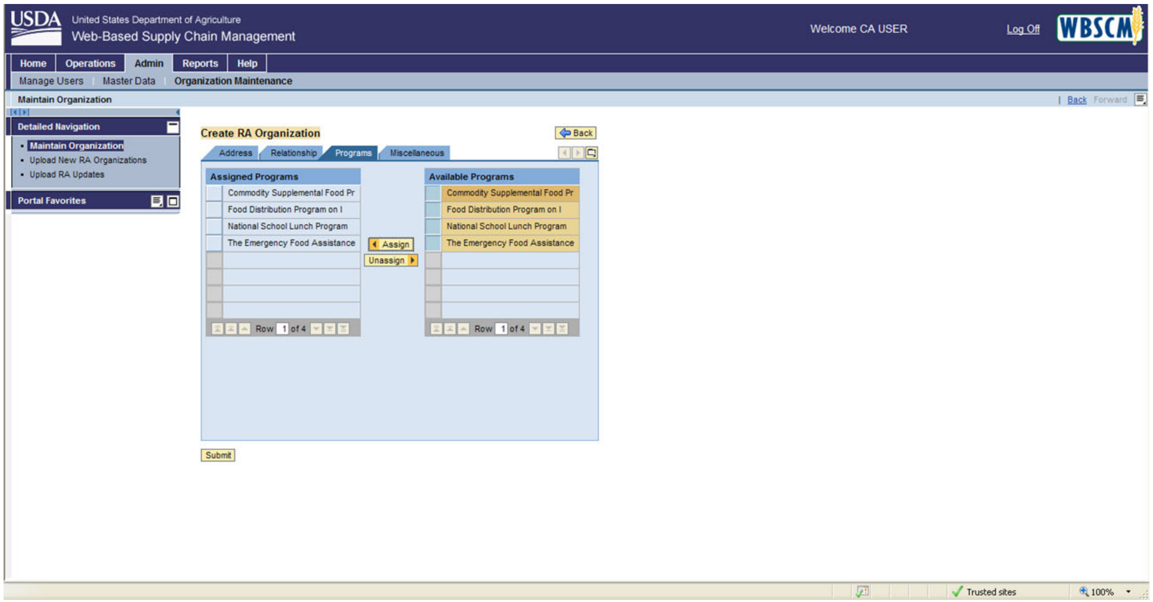
13. Click Programs (the **Programs** tab) to assign programs to the RA. Keep in mind that you will only see programs that have been assigned to your SDA by FNS.

Create RA Organization Screen



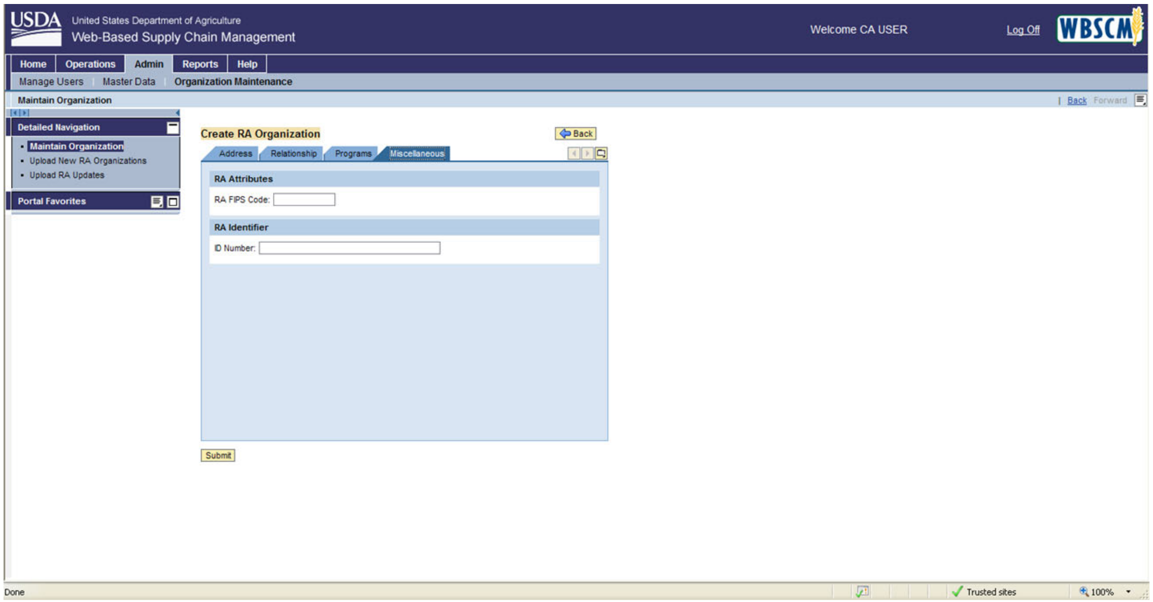
14. Select the program(s) to assign to your RA. Highlight the name of the program(s) from the *Available Programs* column. Click Assign (the **Assign** button) to assign the program to the RA. Only those programs assigned to the SDA by FNS can be assigned to the RA.

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

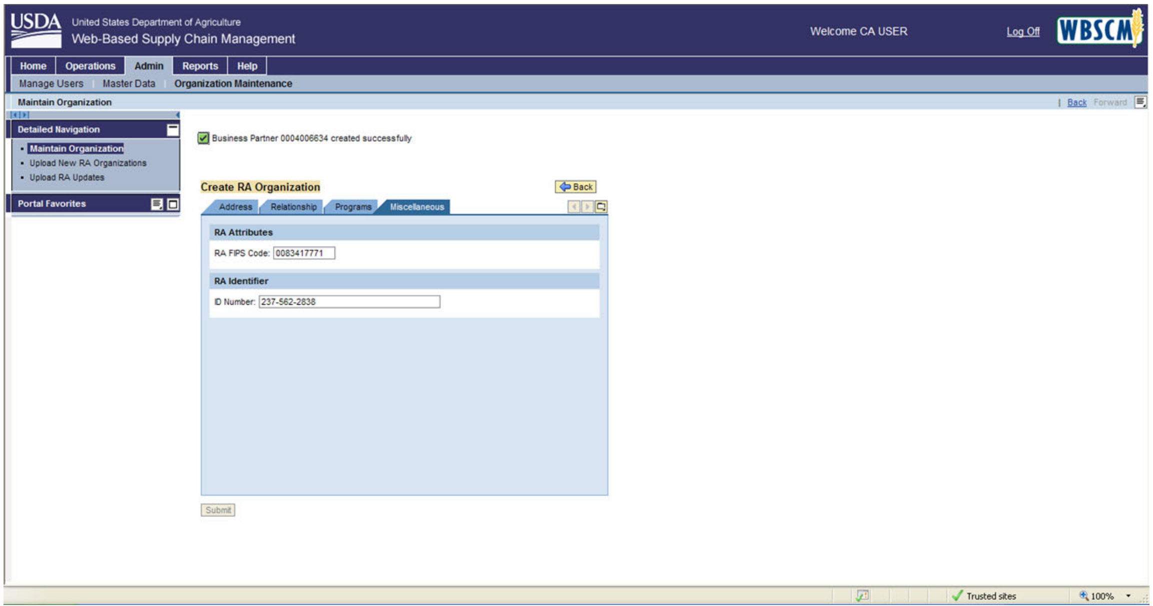


16. Click (the **text box**) to enter the *FIPS Code* and the *ID Number*.

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.*

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.

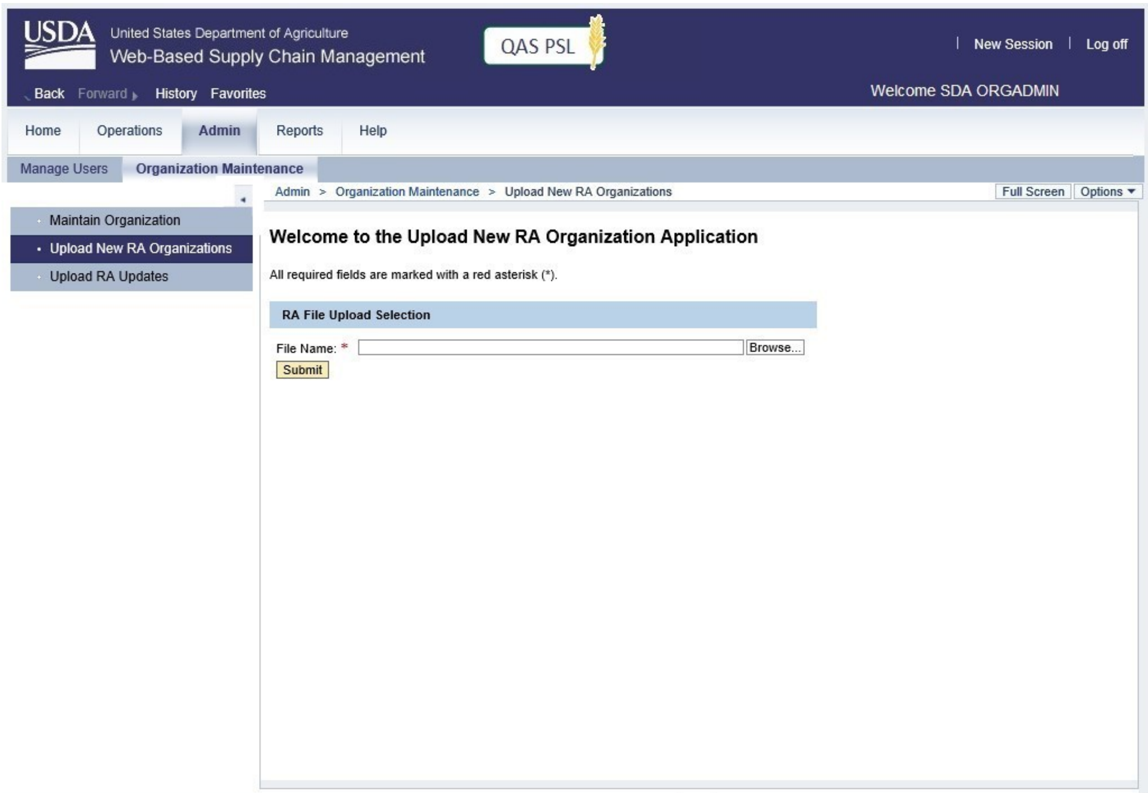
Tips and Tricks

- 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

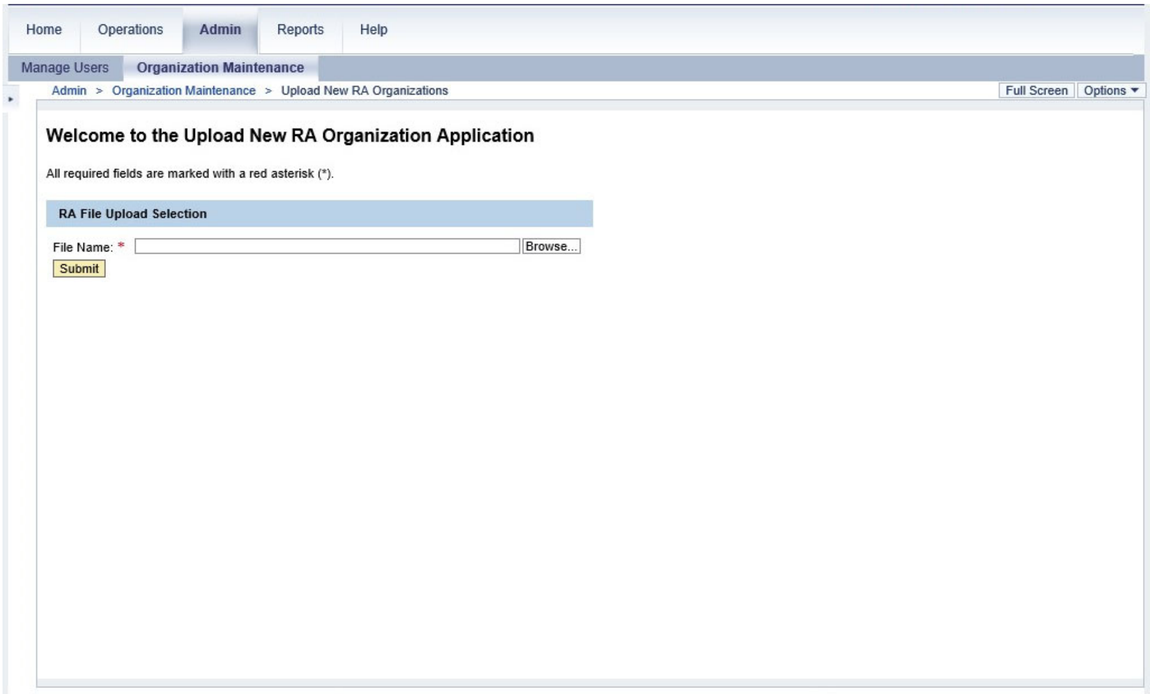
1. Start the transaction using the following Portal path: select **Admin** tab ➔ **Organization Maintenance** tab ➔ **Upload New RA Organizations**

Image: Upload New RA Organizations - WBSCM Portal



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

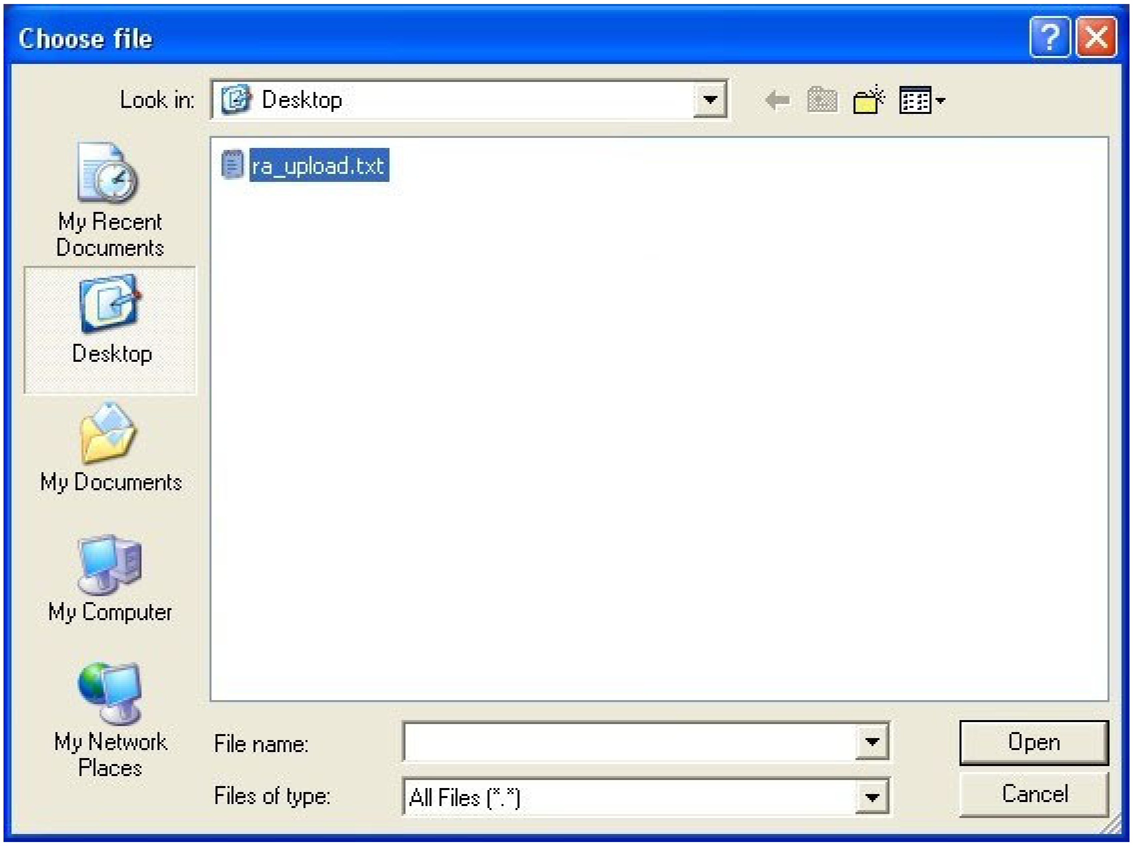
Image: Upload New RA Organizations Screen



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.

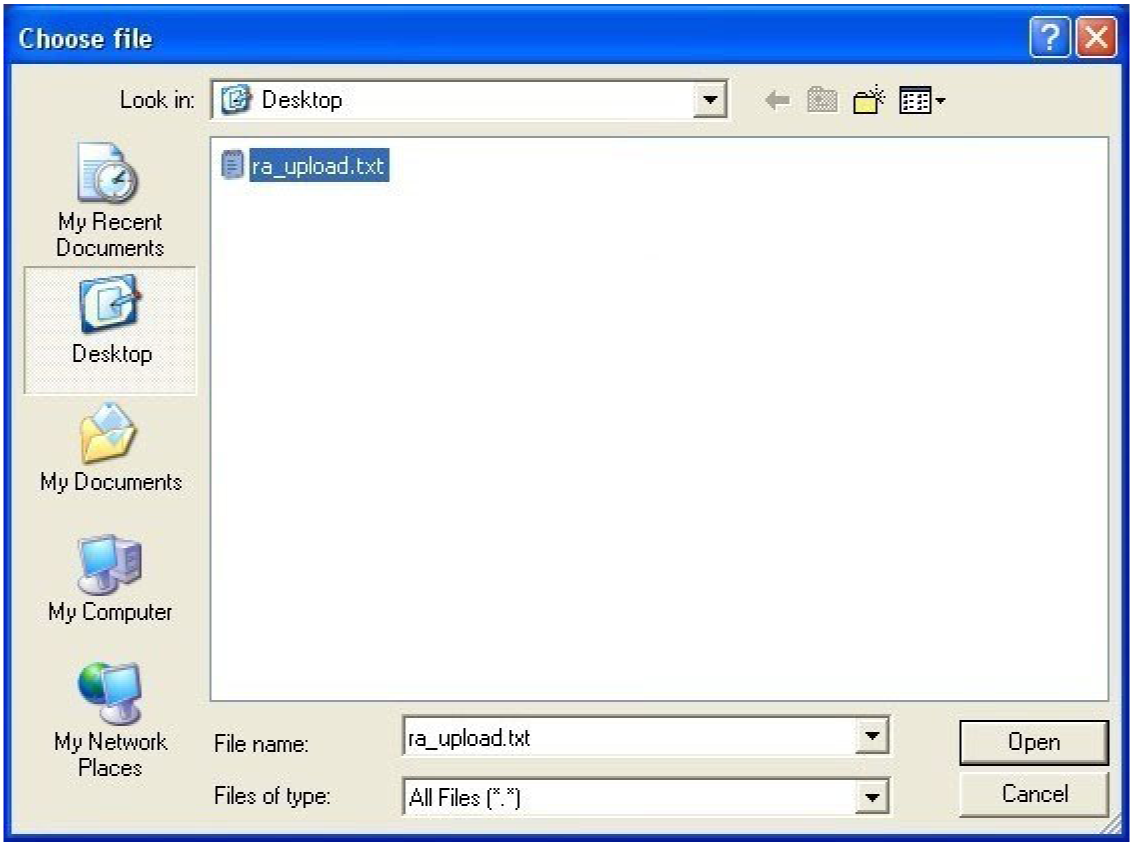
Image: Choose File Pop-up



4. Click on the XML file to select it. In this example the 

(the **ra_upload.txt** file) was selected.

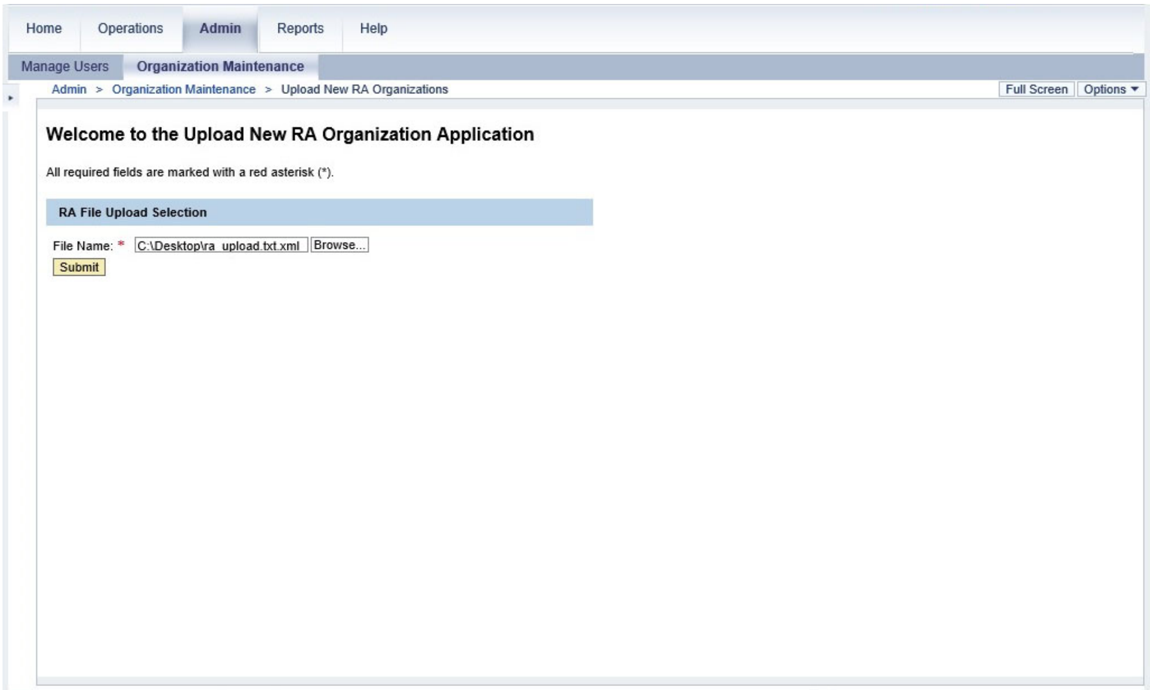
Image: Choose File Pop-up



5. Click 

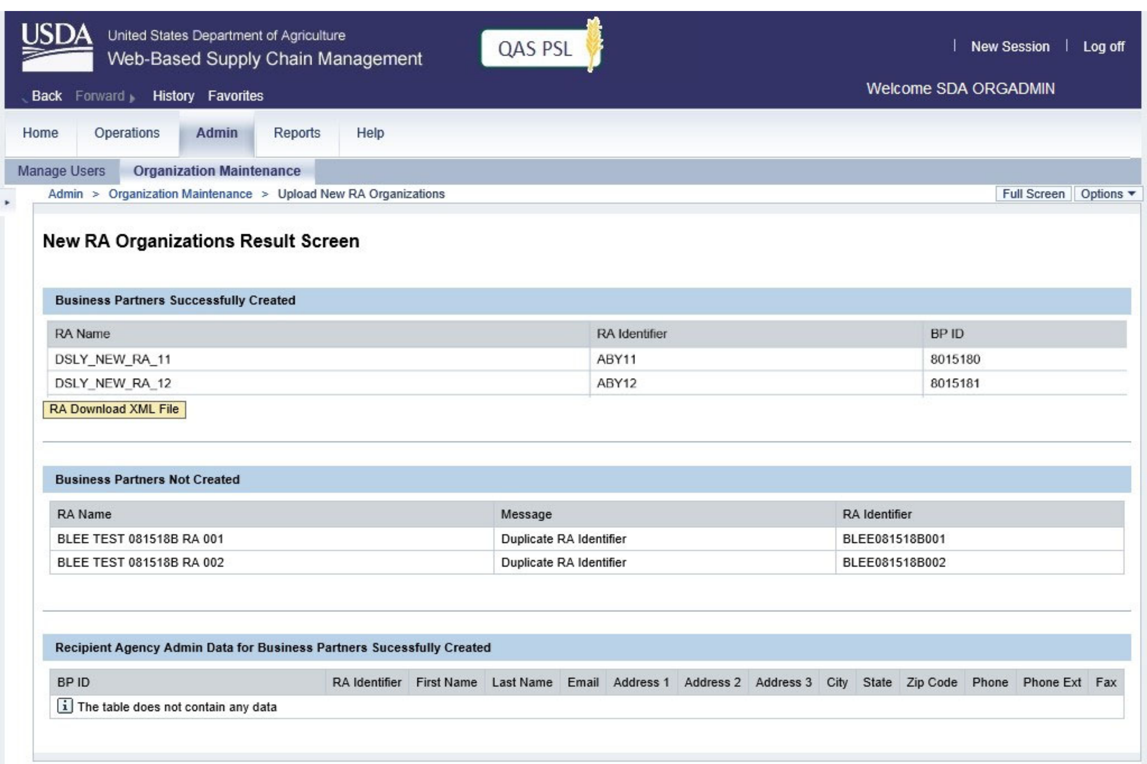
(the **Open** button) to begin the upload process for this file.

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.

(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.

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.

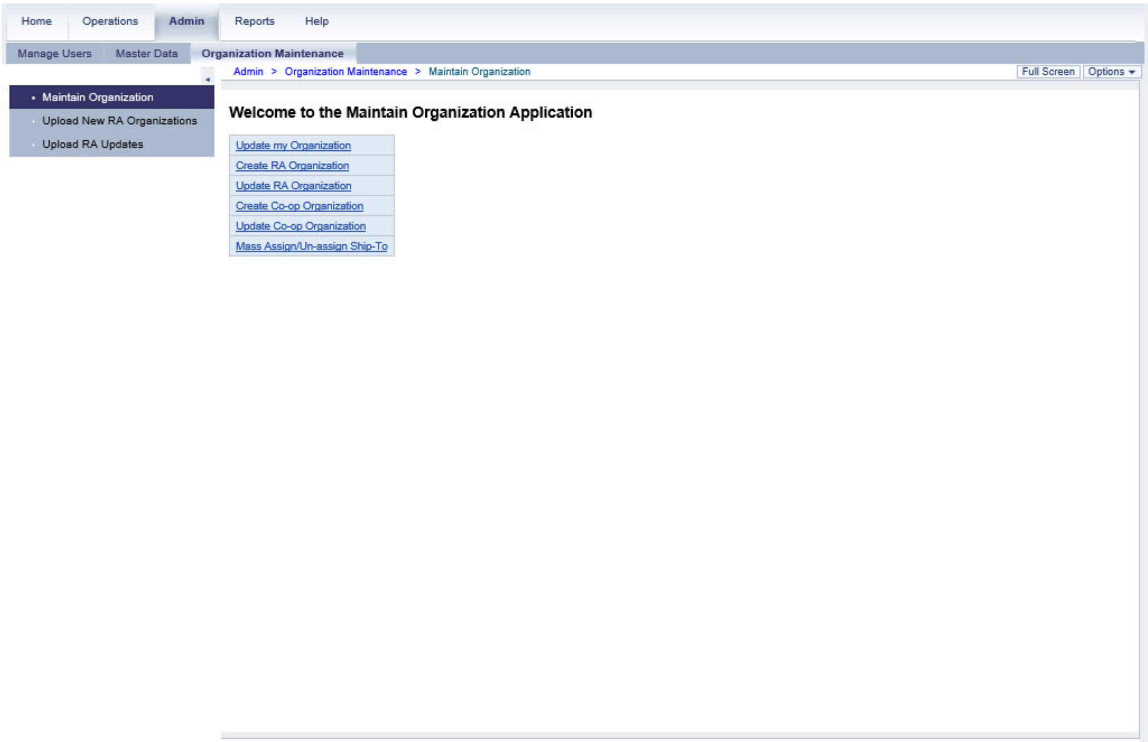
Tips and Tricks

- 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

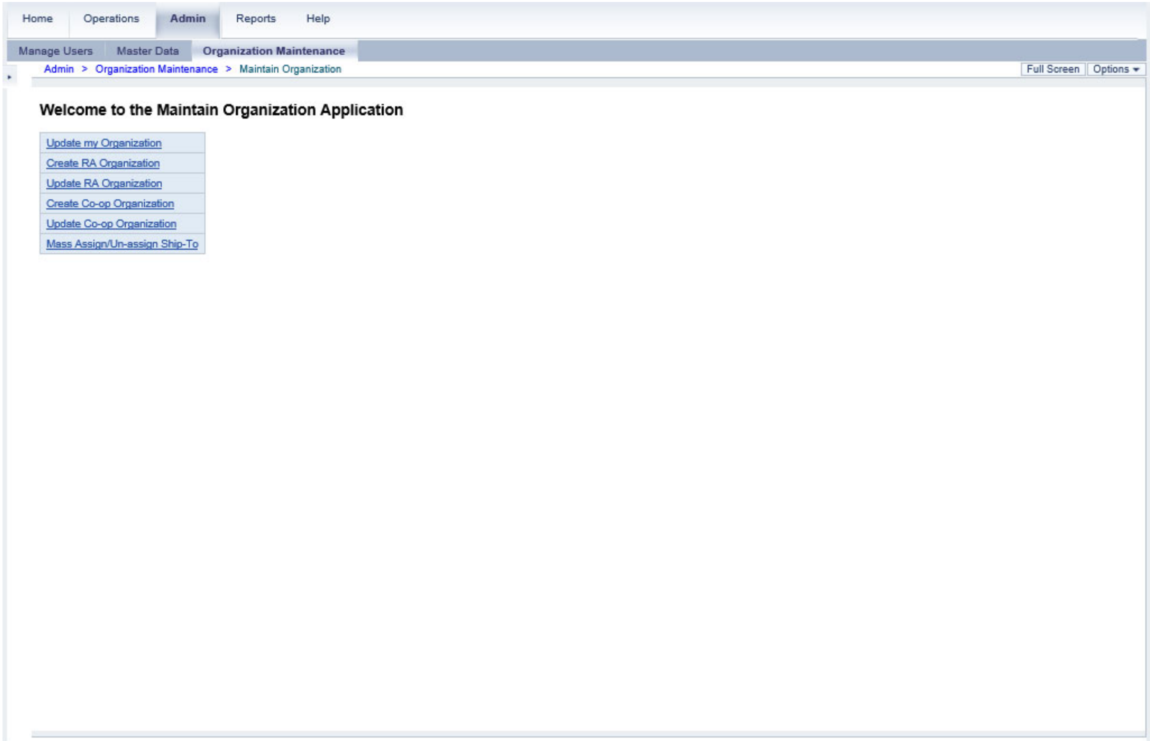
1. Start the transaction using the Portal path. Select **Admin** tab ➔ **Organization Maintenance** folder ➔ **Maintain Organization** link.

Image: Maintain Organization Screen



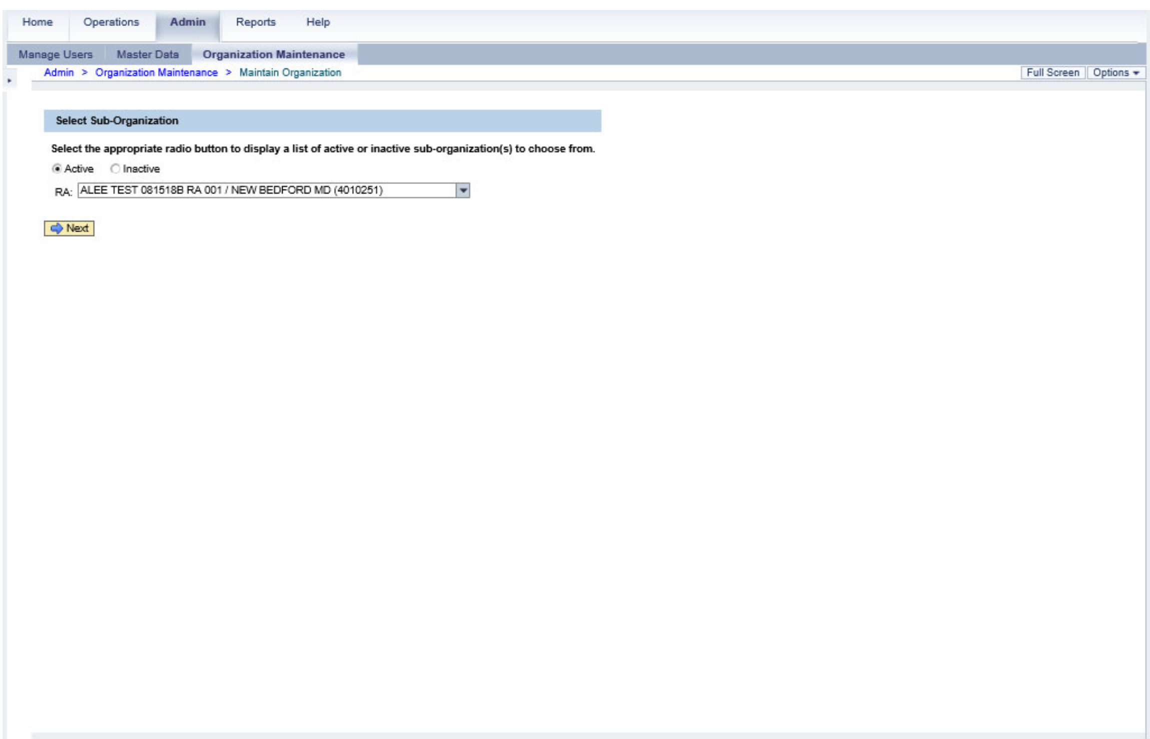
2. Click (the **Hide Navigator** button) to minimize the Portal menu. Note this can be done with any transaction in WBSCM.

Image: Maintain Organization Screen



3. Click Update RA Organization (the **Update RA Organization** button).

Image: Maintain Organization Screen



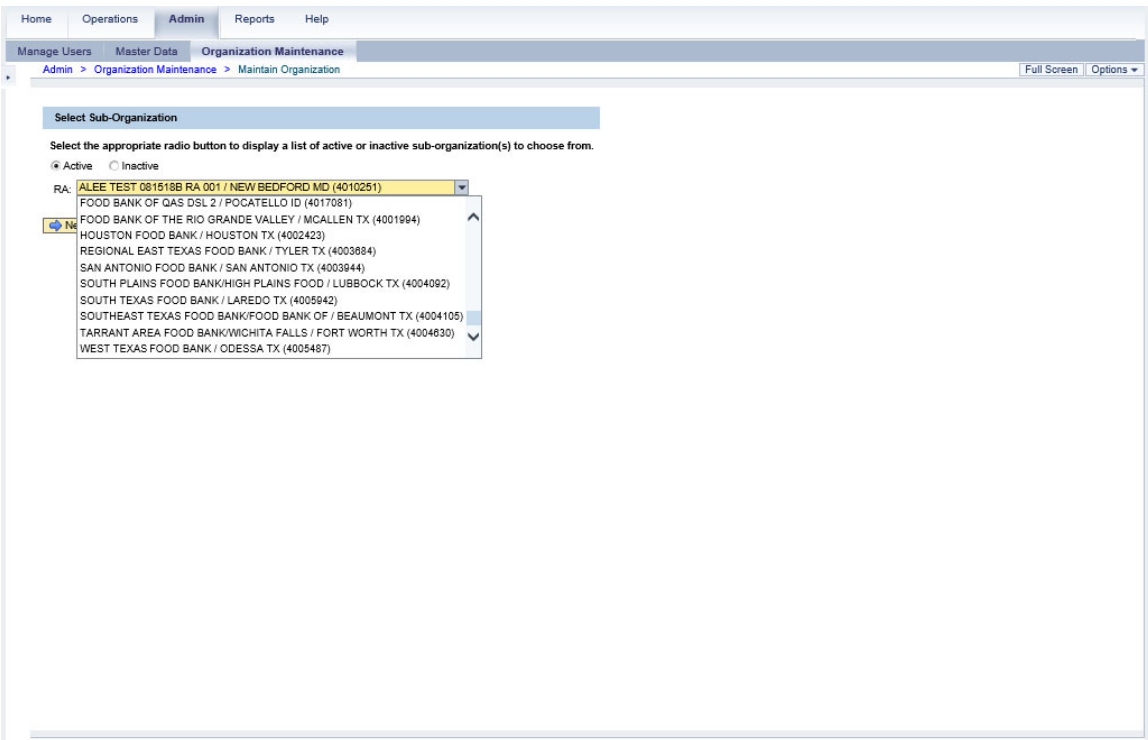
4. Click (the **Drop-down** button) from the **RA** field to select the required RA.

(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

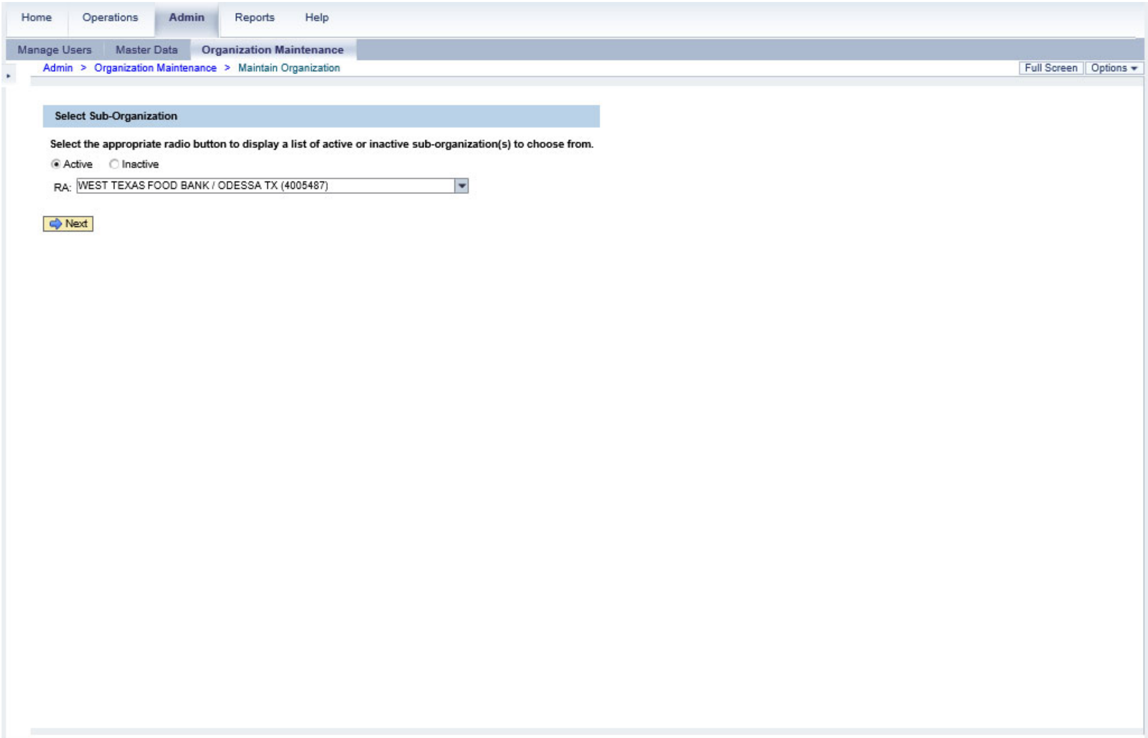


5. Select the appropriate RA from the list. In this example, WEST TEXAS FOOD BANK / ODESSA TX (4005487) (the **WEST TEXAS FOOD BANK / ODESSA TX (4005487)**) is selected.

(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

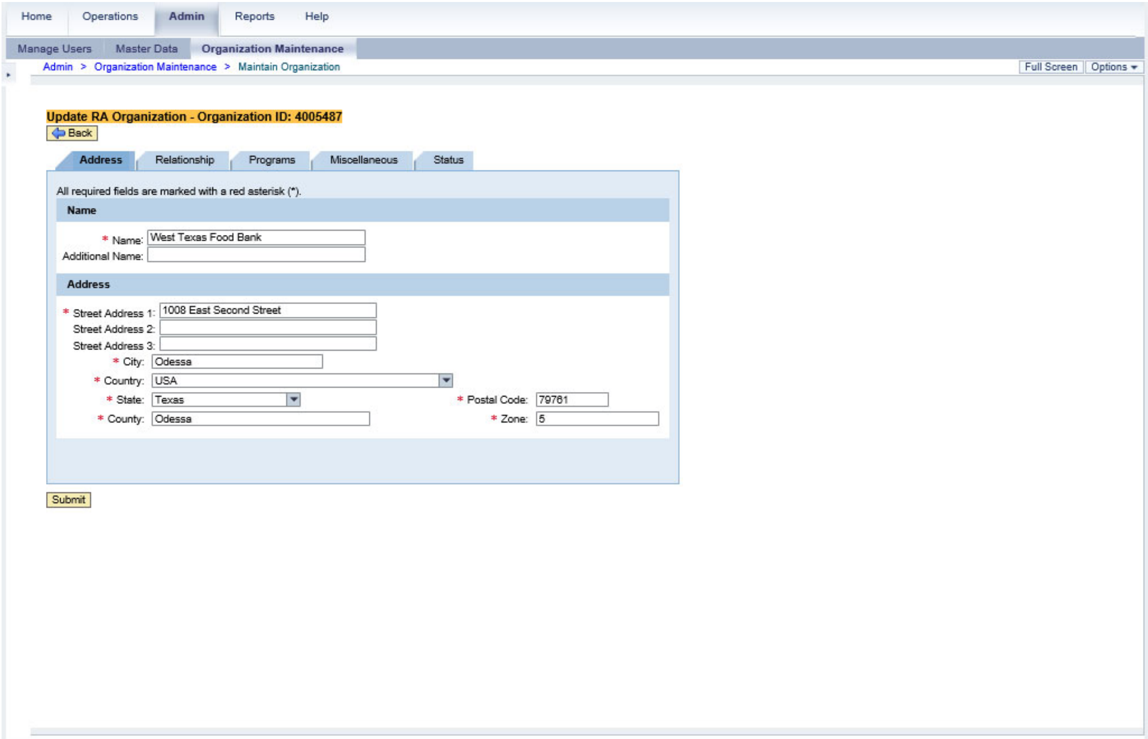


6. Click Next (the **Next** button).

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

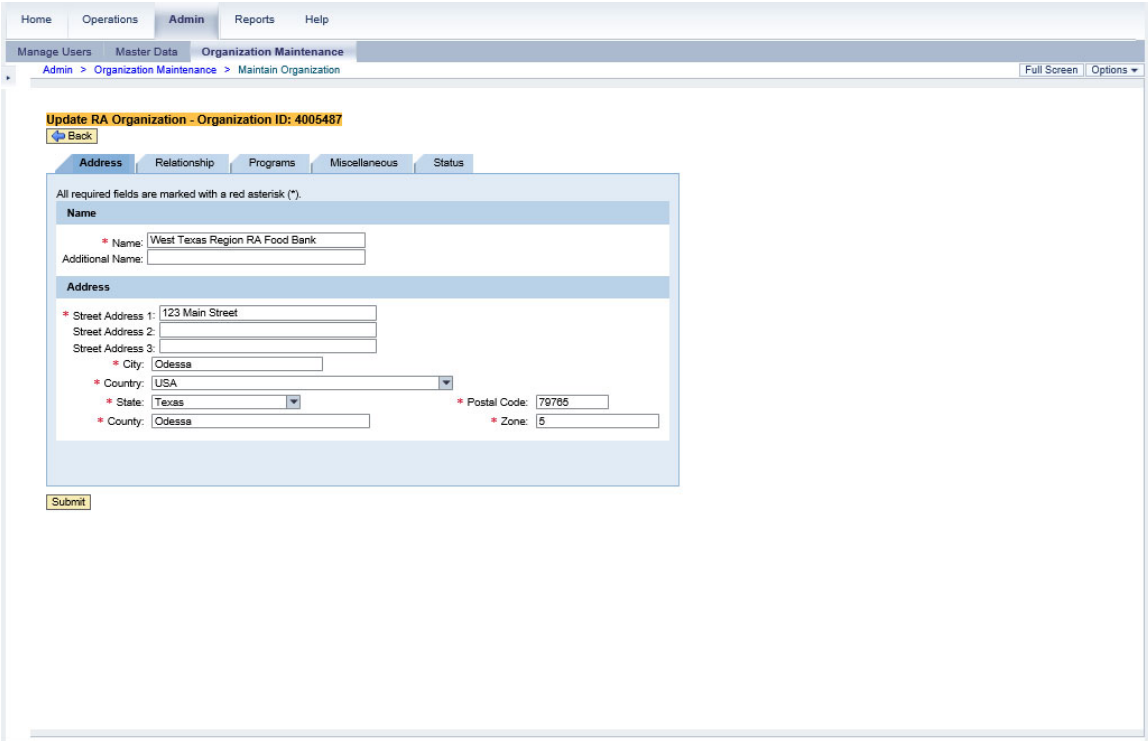


8. As required, complete/review the following fields:

Field	R/O/C	Description
Name:	R	Person or business partner’s name. **Example:** 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. **Example:** 123 Main Street
Street Address 2:	O	A free text field in which to enter the street address of the user or organization.

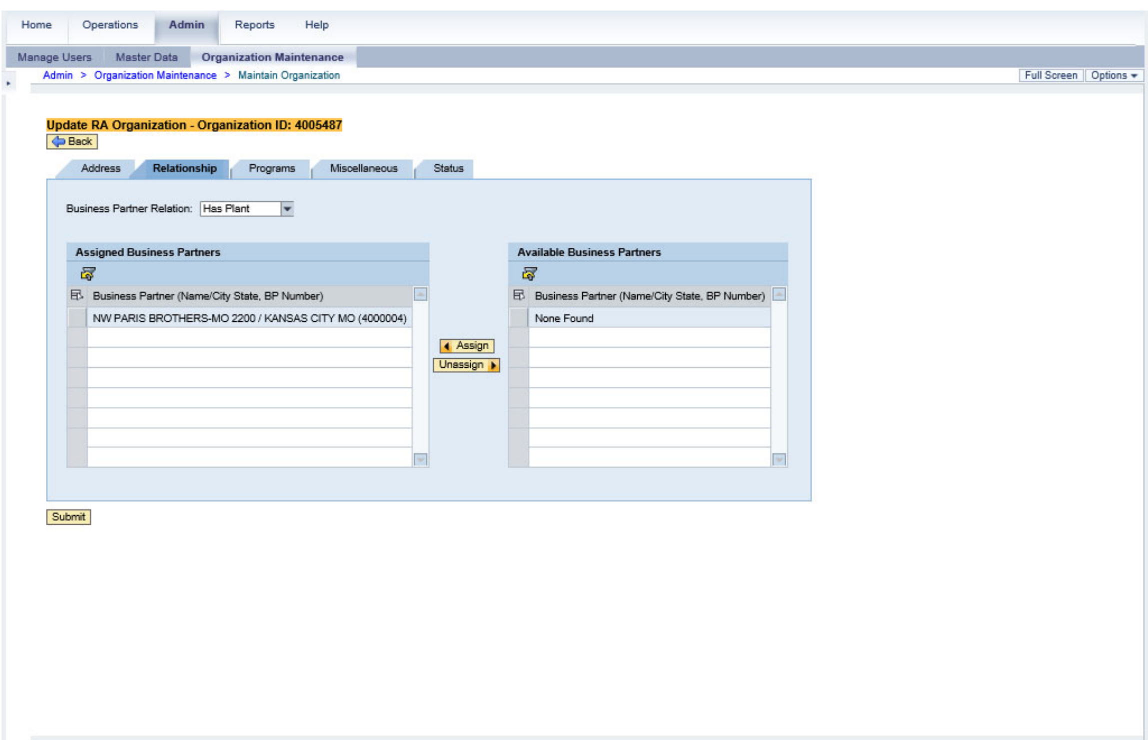
Field	R/O/C	Description
Street Address 3:	O	A free text field in which to enter the street address of the user or organization.
City:	R	City where the user or company is located. **Example:** Odessa
Country:	R	Country code that represents country name. **Example:** USA (Note) The Country (**Drop-down**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

Image: Maintain Organization Screen



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

Image: Maintain Organization Screen

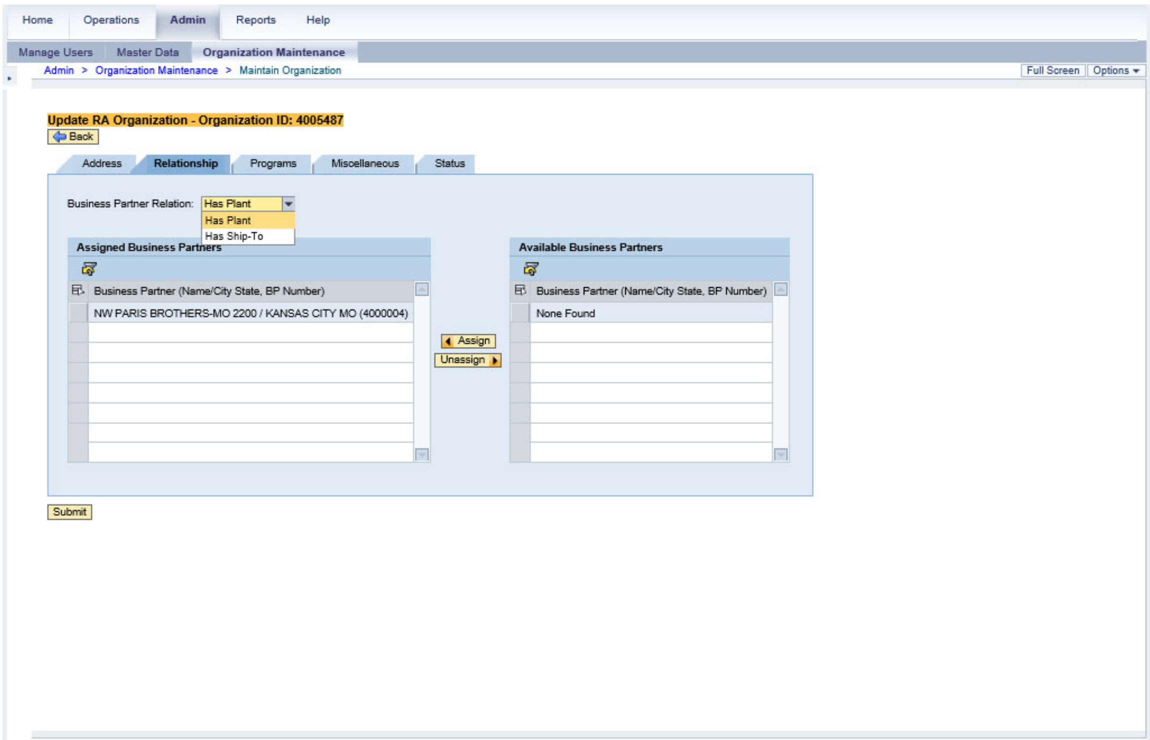


10. Click (the **Drop-down** button) for the **Business Partner Relation** field.

(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:

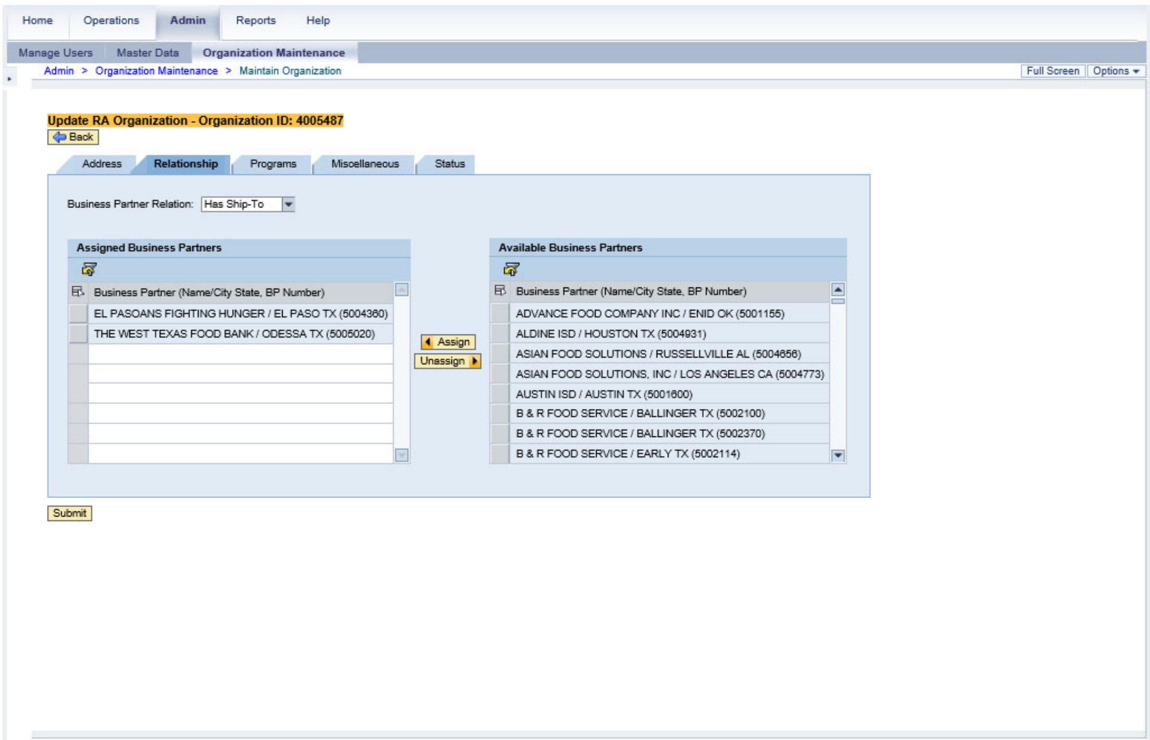
- If the business partners are listed in consecutive rows, hold down the Shift key and click the first and last selection buttons.
- To select business partners from non-consecutive rows, hold down the Ctrl key while clicking each selection button.

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

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

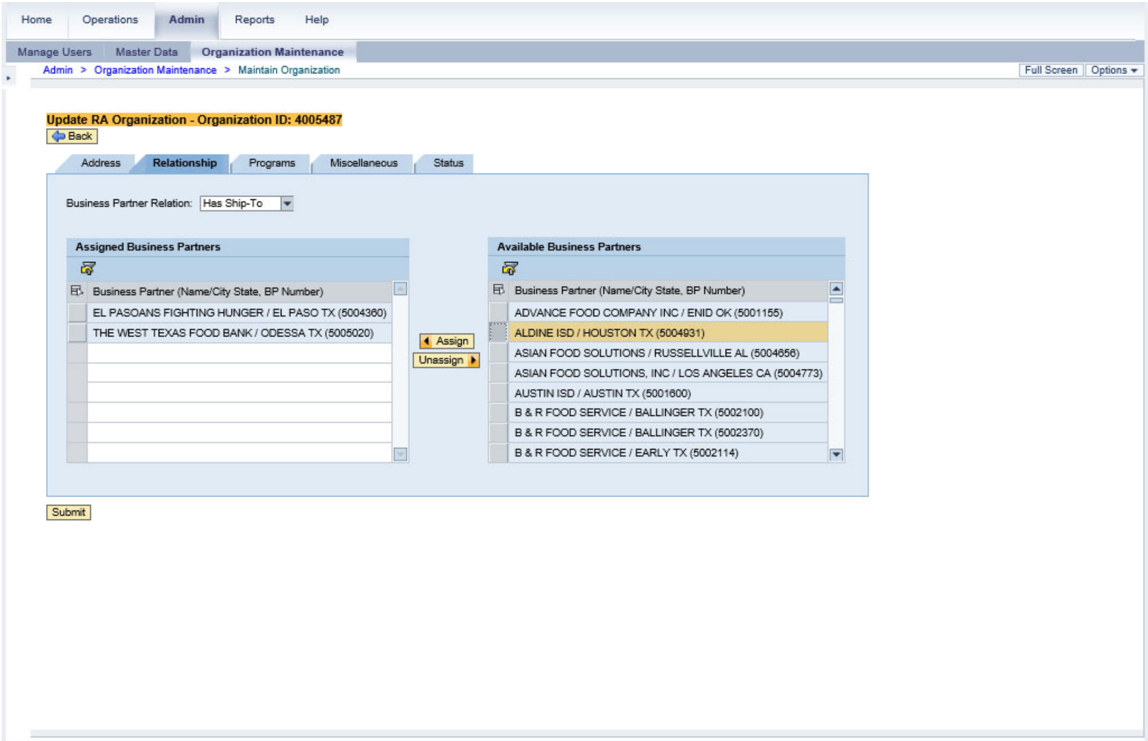
(Name/City State, BP Number) field. Select (All) (User-Defined Filter...) (the **User-Defined Filter...** option) and enter required criteria. Use * (the **Asterisk** symbol) at the beginning and at the end of a search term (e.g., *Craven* or *5001716*) to search for a Business Partner that contains 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.

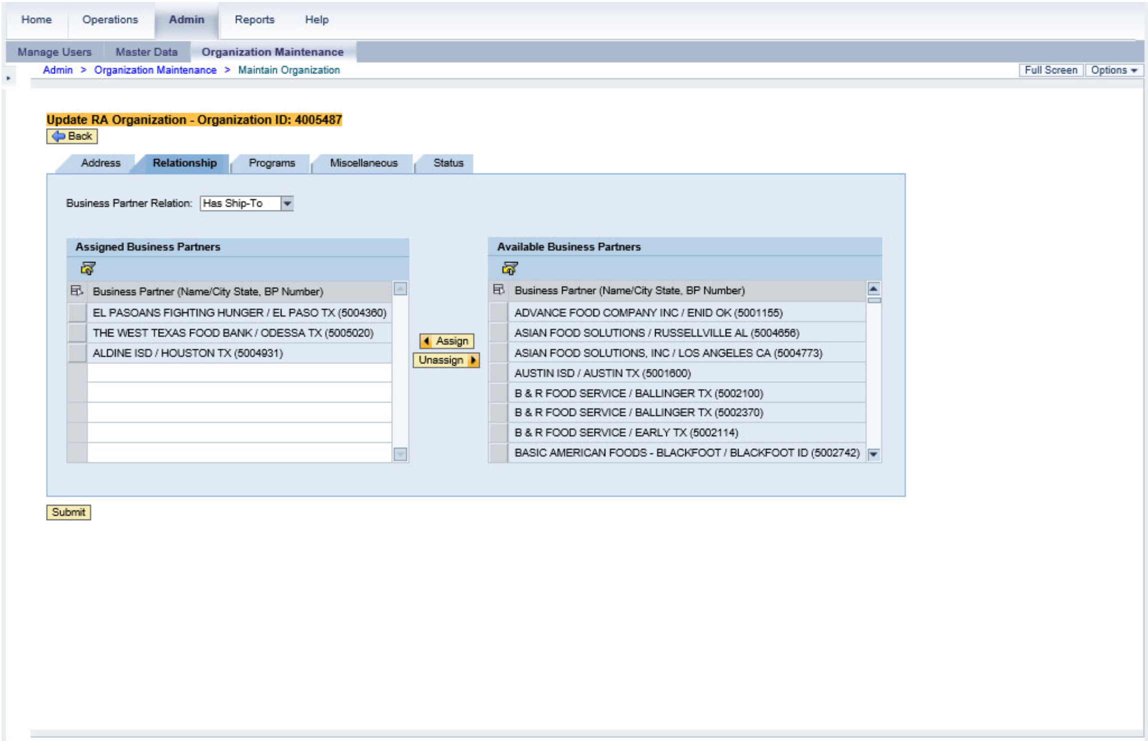
Image: Maintain Organization Screen



13. Click Assign (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 Unassign (the **Unassign** button).

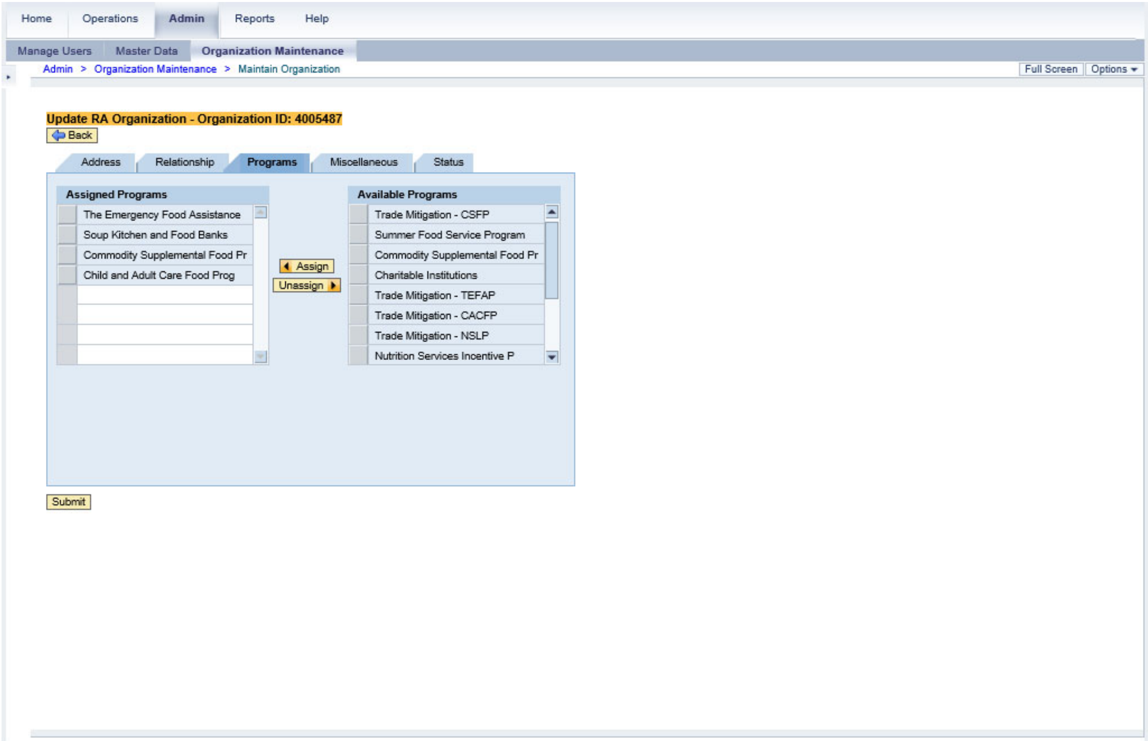
Image: Maintain Organization Screen



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

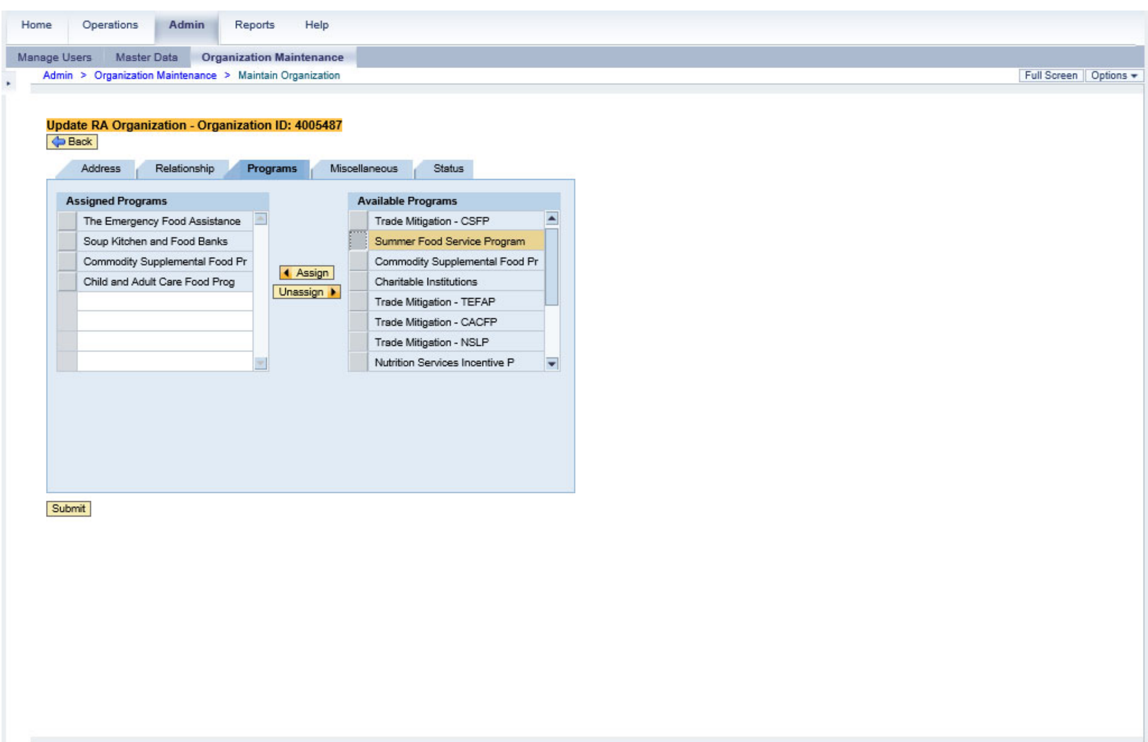
(Note) Only programs that have been assigned to the user's SDA by FNS will be shown.

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.

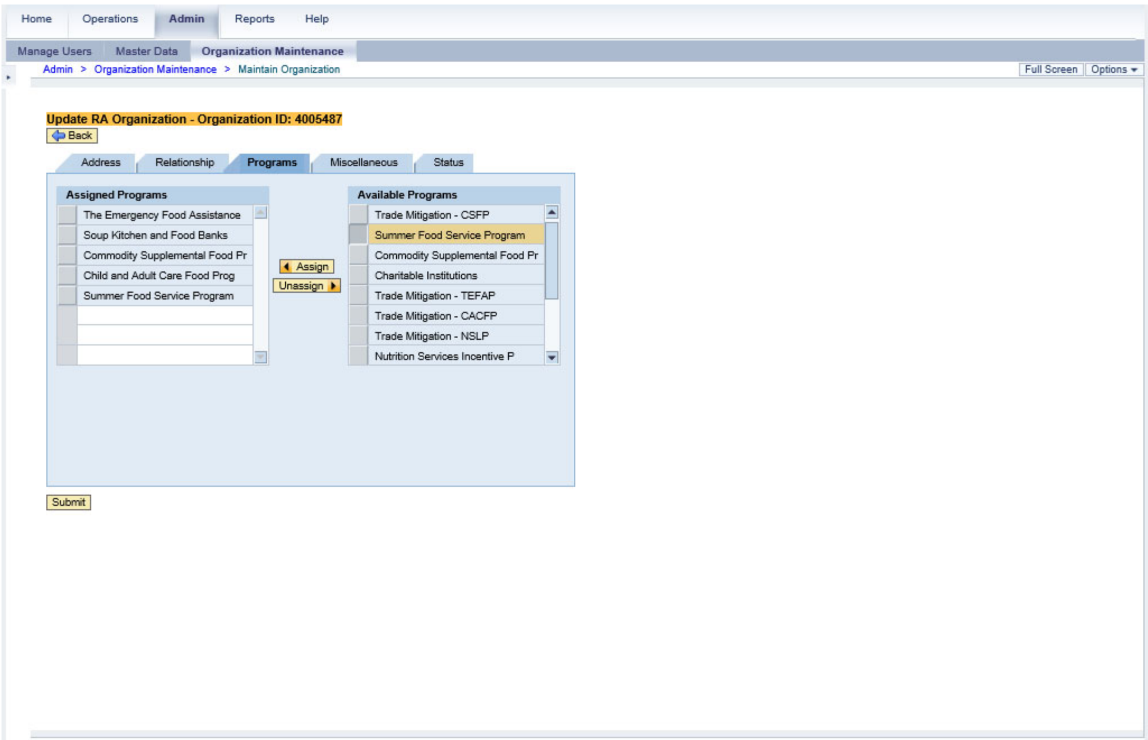
Image: Maintain Organization Screen



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

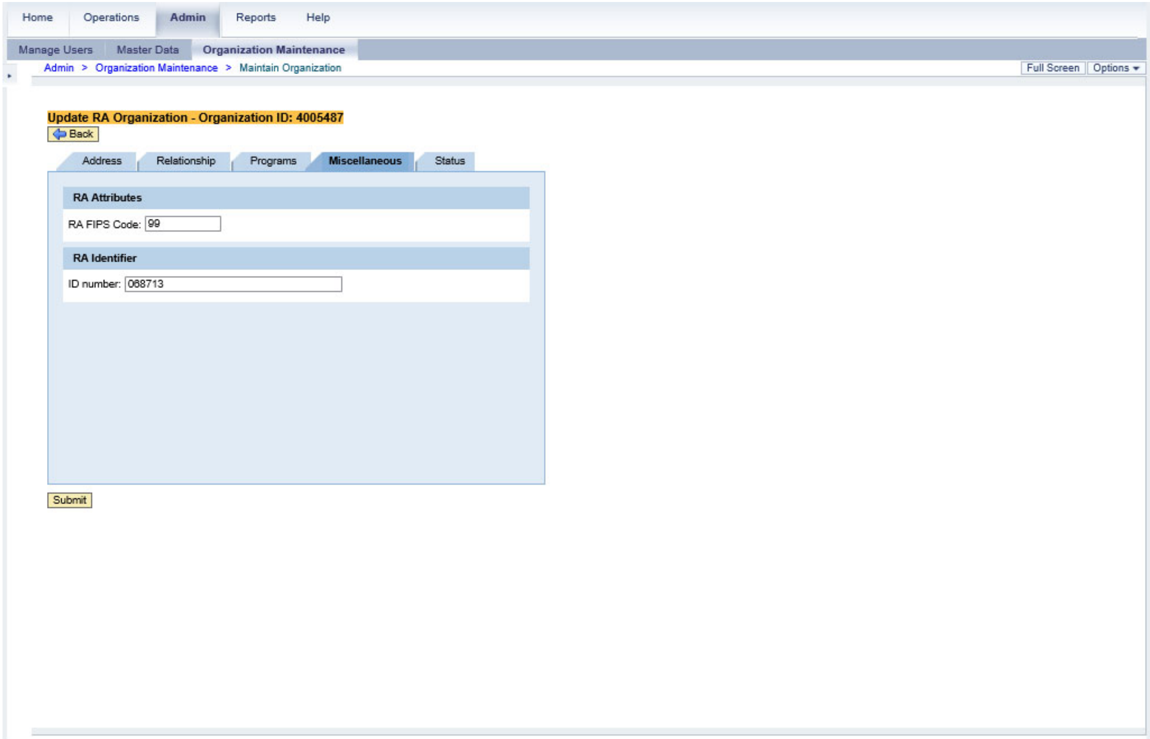
(Note) To unassign program(s), click (the **Selection** button) to select the program(s) from the *Assigned Programs* section, and then click Unassign (the **Unassign** button).

Image: Maintain Organization Screen



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

Image: Maintain Organization Screen



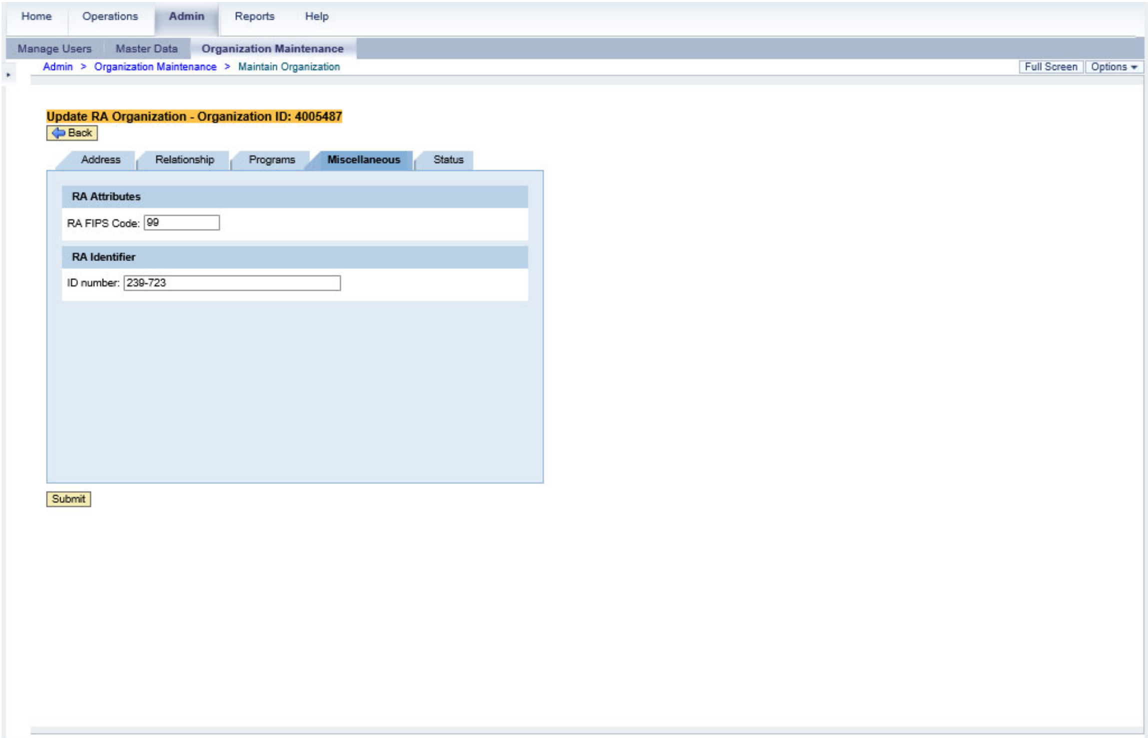
18. As required, complete/review the following fields:

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

19. Go to Step 23.

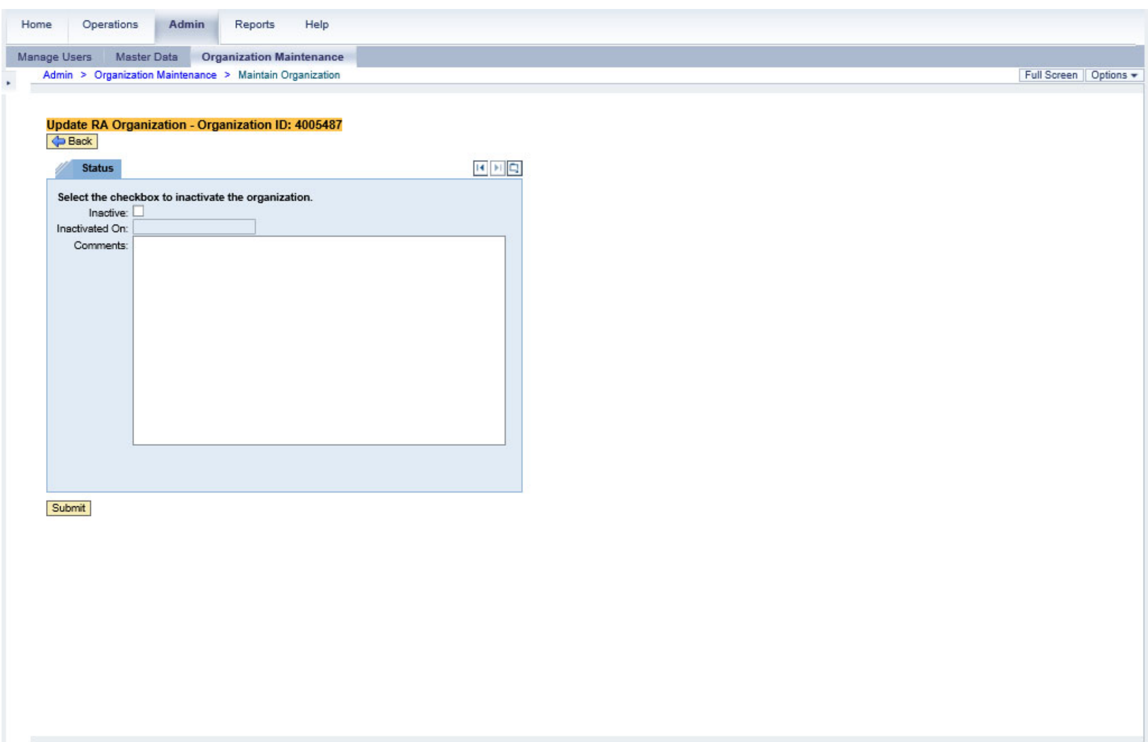
(Note) Steps 20 - 22 review how to inactivate an RA.

Image: Maintain Organization Screen



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

Image: Maintain Organization Screen



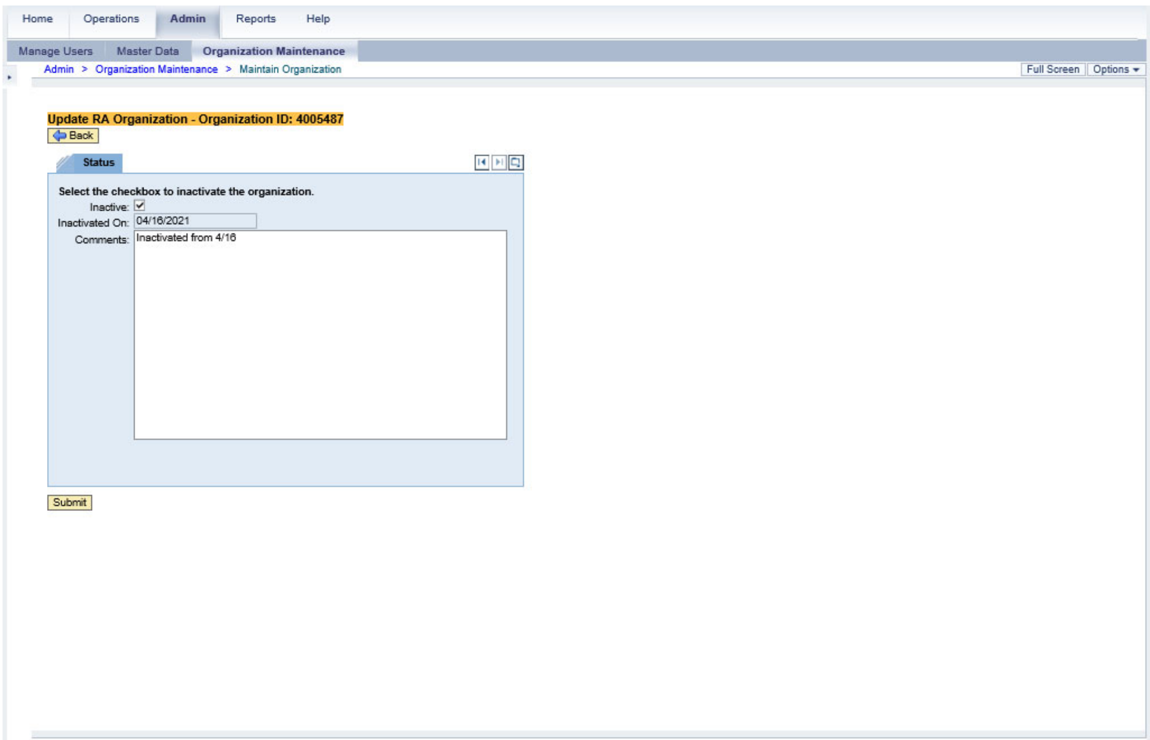
21. Click ☐ (the **Inactive** checkbox) to change the status of the RA.

(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.

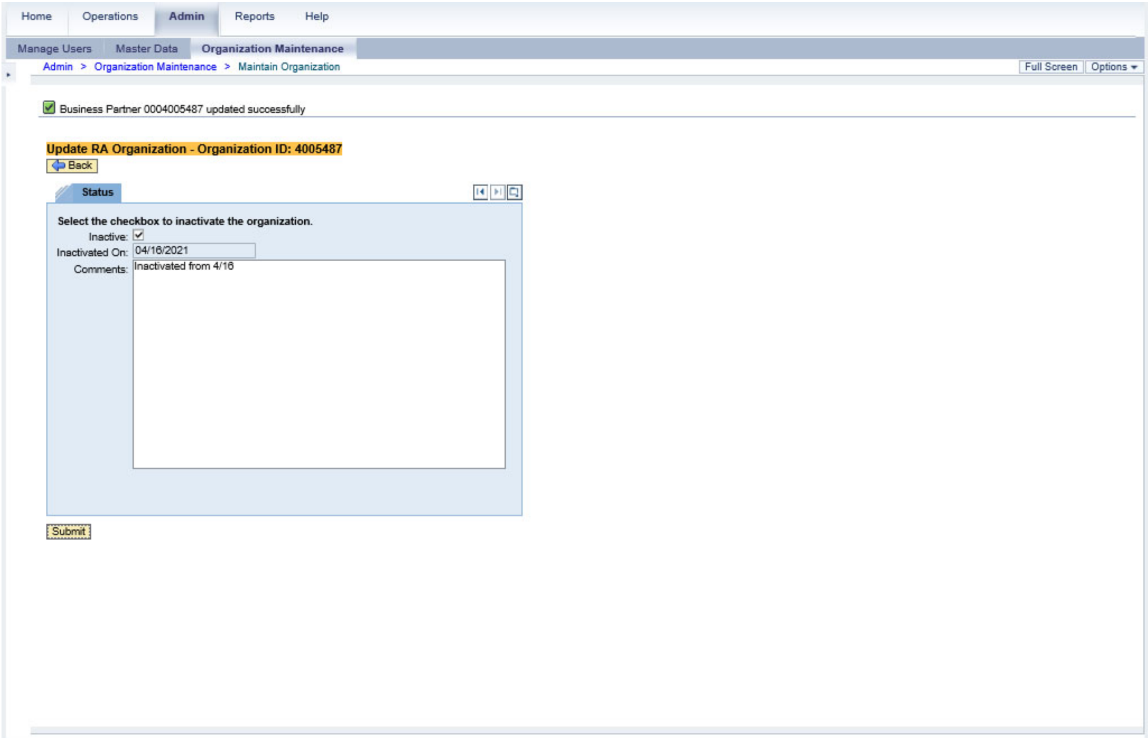
Image: Maintain Organization Screen



23. Click Submit (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.

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

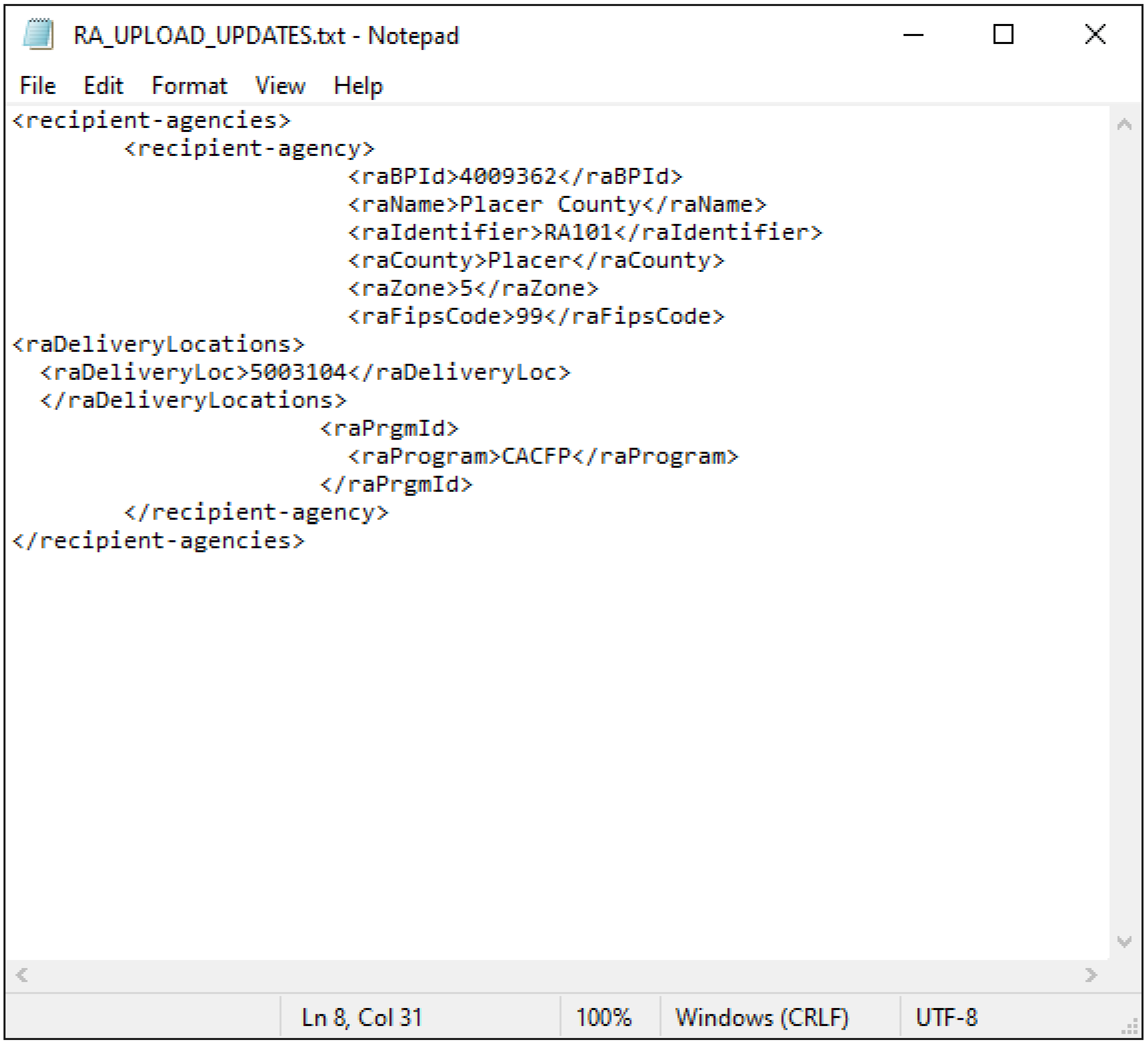
- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that 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

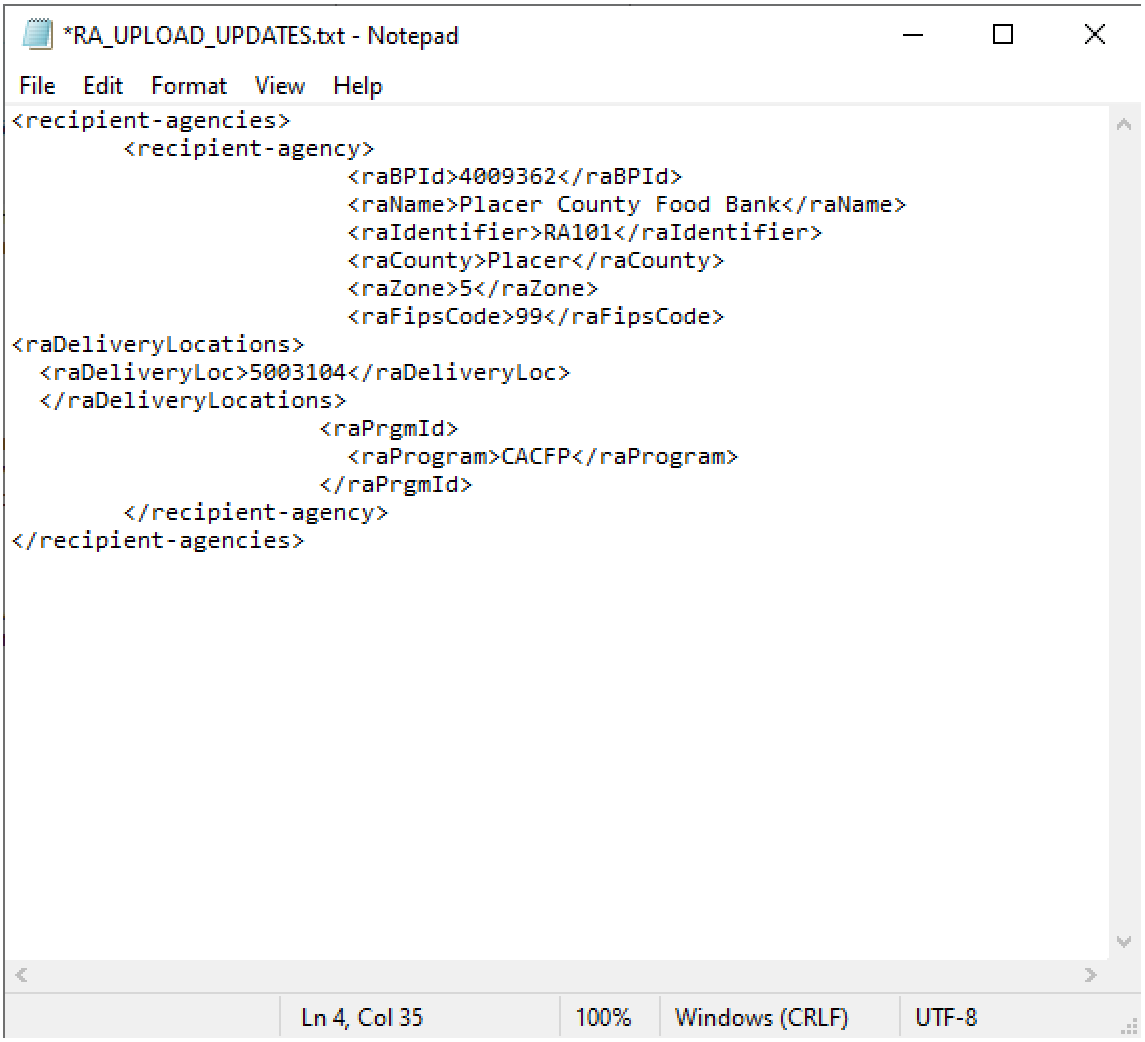
File Edit Format View Help

```
<recipient-agencies>
        <recipient-agency>
                        <raBPId>4009362</raBPId>
                        <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

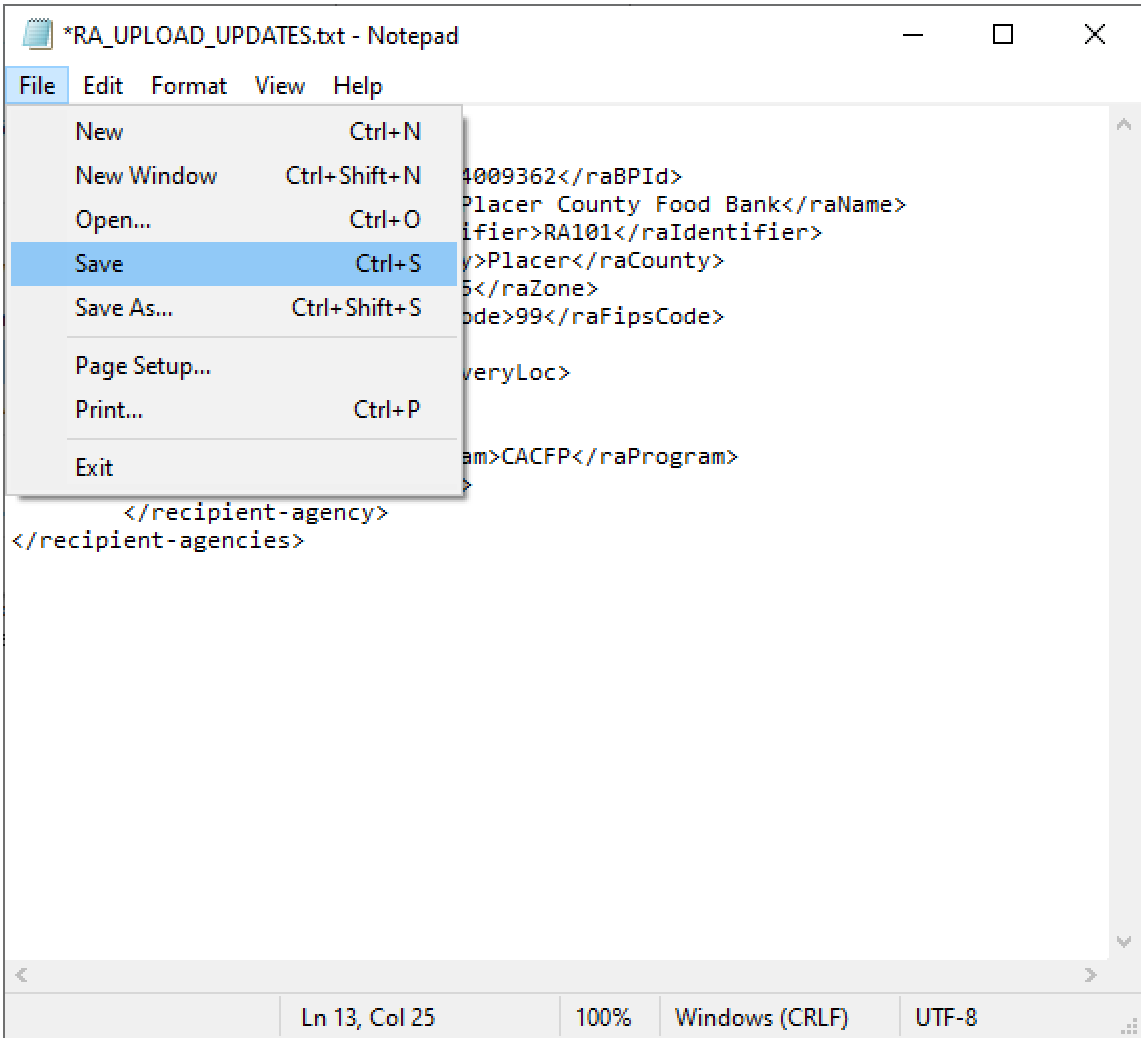
2. Update the XML as necessary. In this example, the **<raName>** field is changed to **Placer County Food Bank**.

Image: Notepad Screen



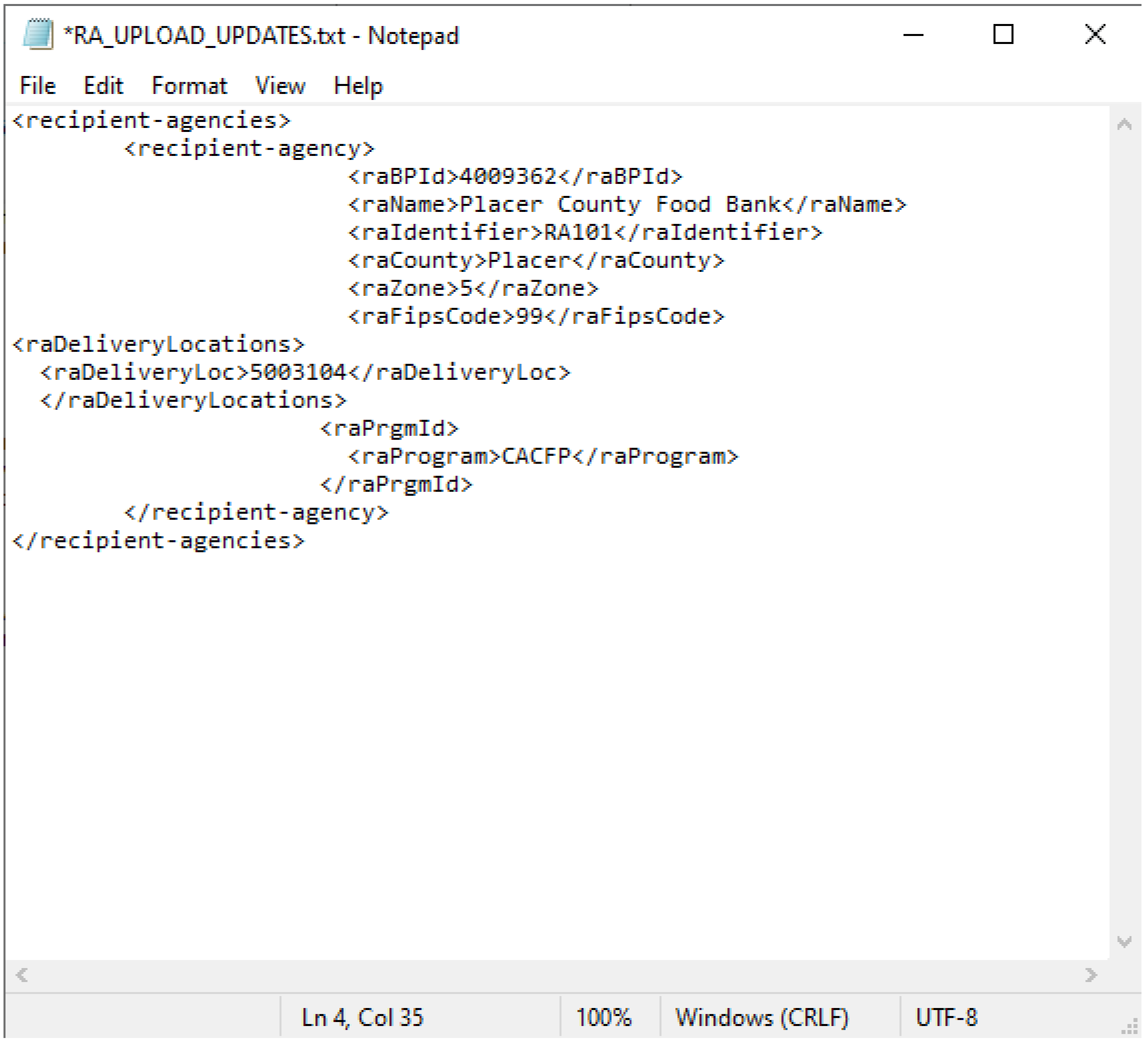
3. Select File (the **File** menu option).

Image: Notepad Screen



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

Image: Notepad Screen

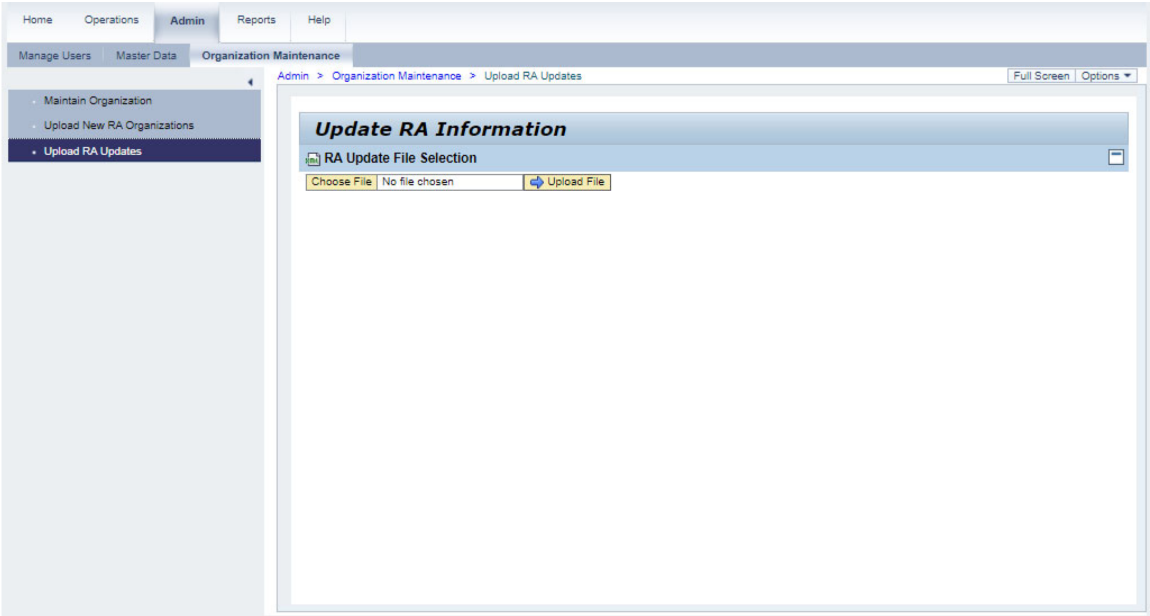


5. Click ✕ (the **Close** button).

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

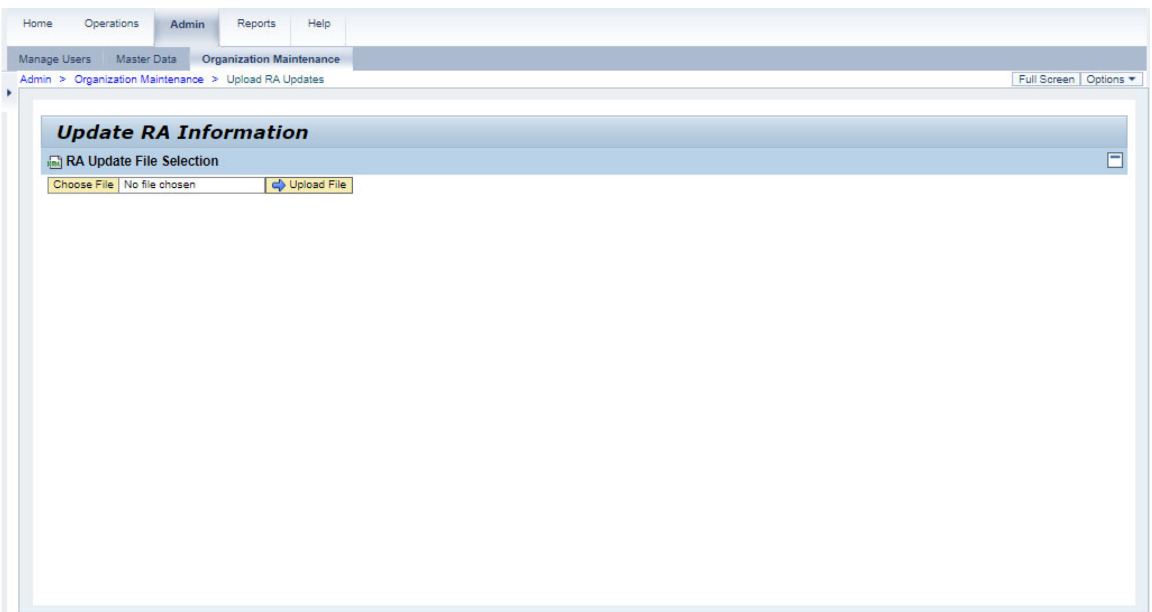
6. Start the transaction using the Portal path: **Admin** tab ➔ **Organization Maintenance** tab ➔ **Upload RA Updates** link.

Image: Upload RA Updates Screen



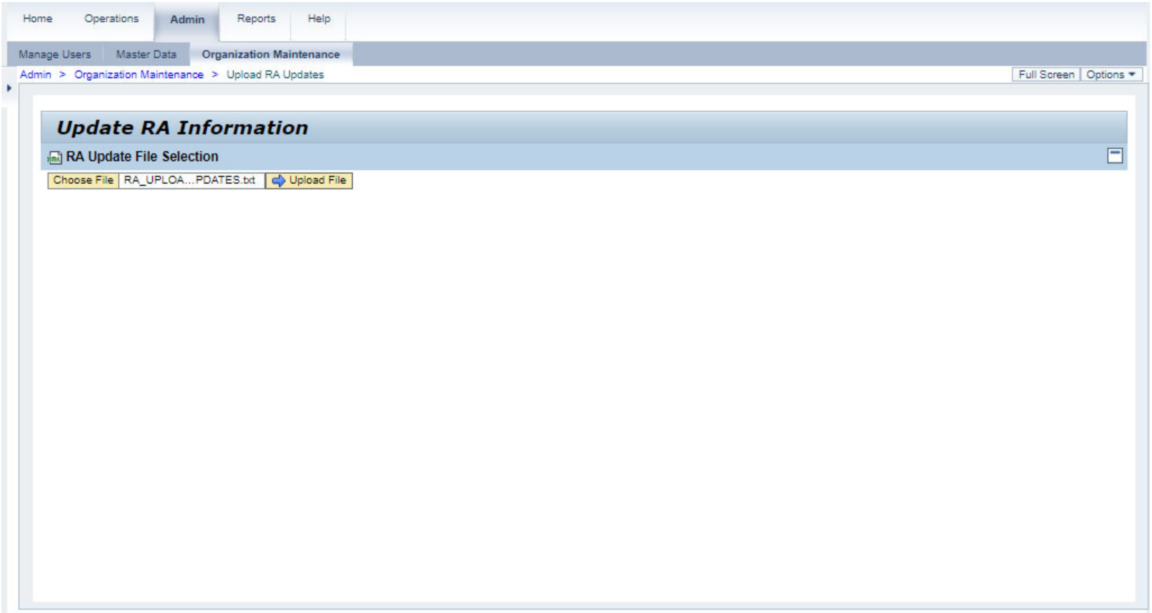
7. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Upload RA Updates Screen



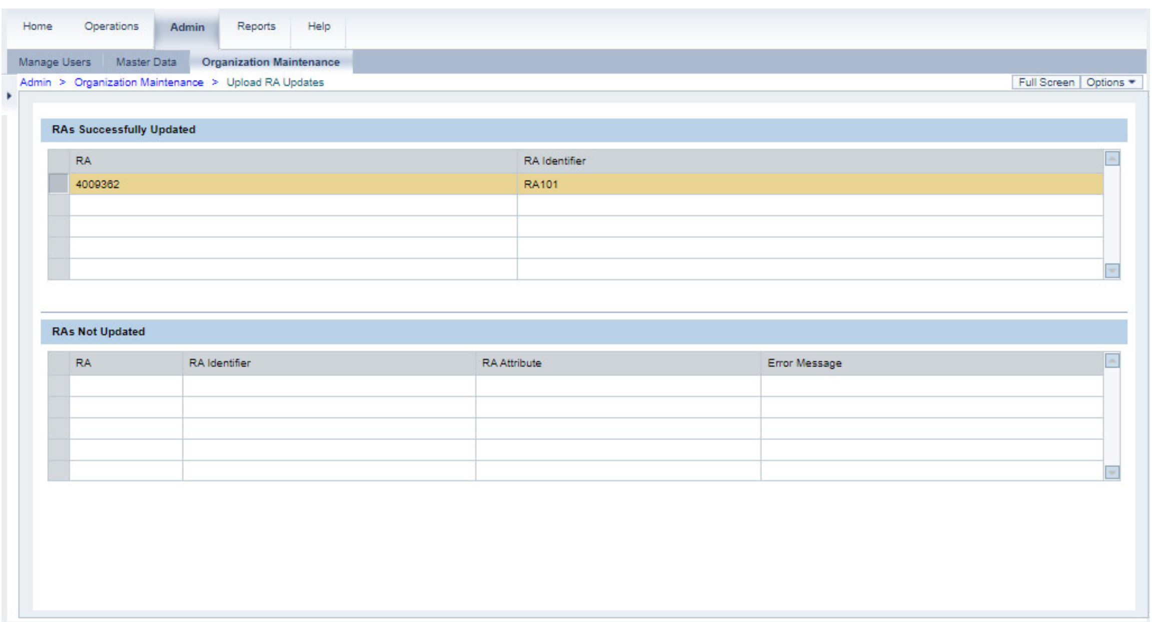
8. Click Choose File (the **Choose File** button) to locate the file to be uploaded. In this example, the **RA_UPLOAD_UPDATES.txt** file was located.

Upload RA Updates Screen



9. Click Upload File (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.

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.

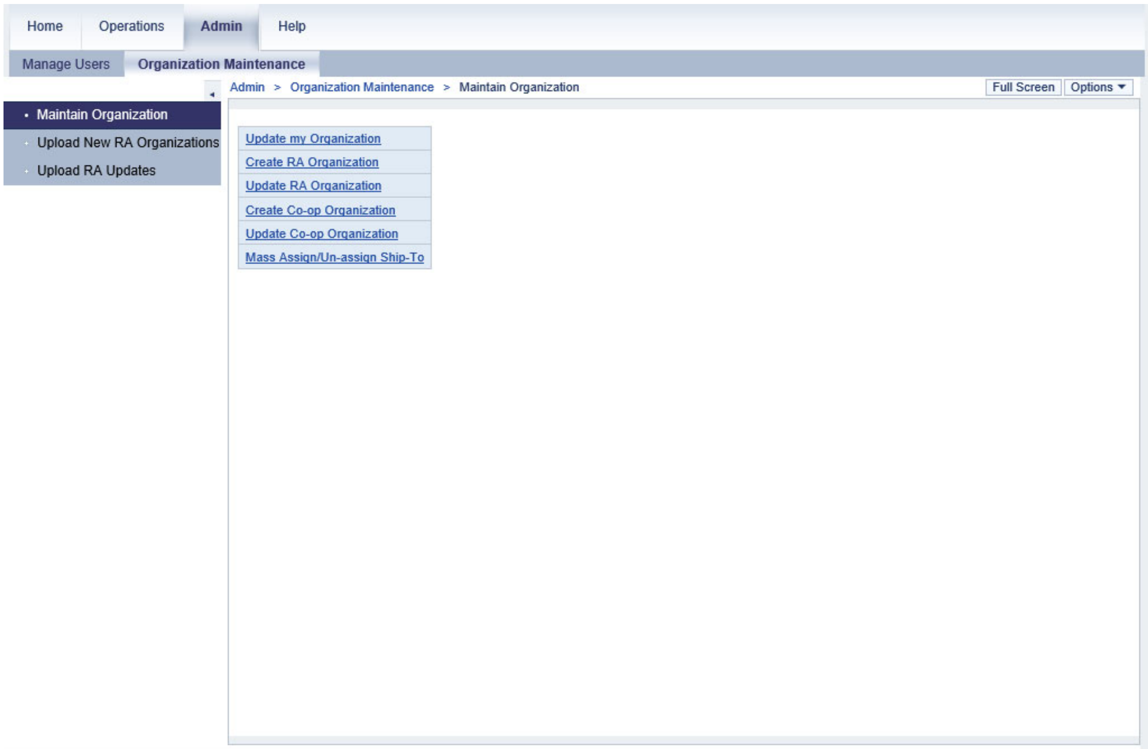
Tips and Tricks

- 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

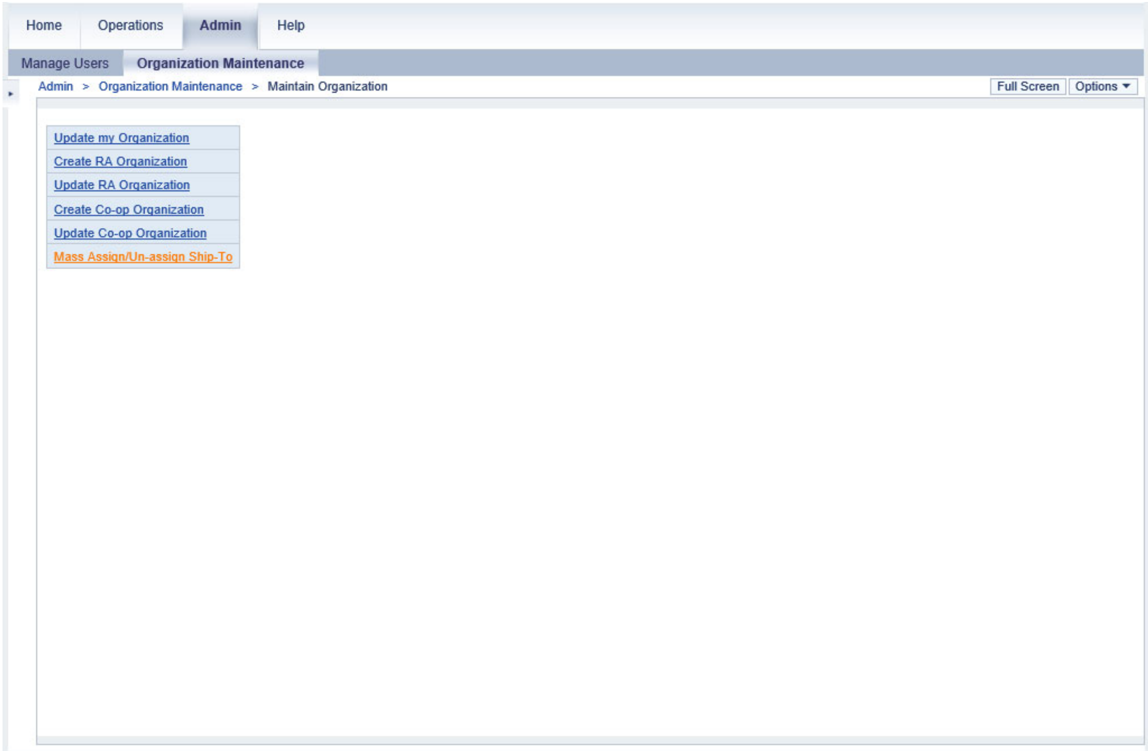
1. Select **Admin** tab ➔ **Organization Maintenance** tab ➔ **Maintain Organization** link.

Maintain Organization Screen



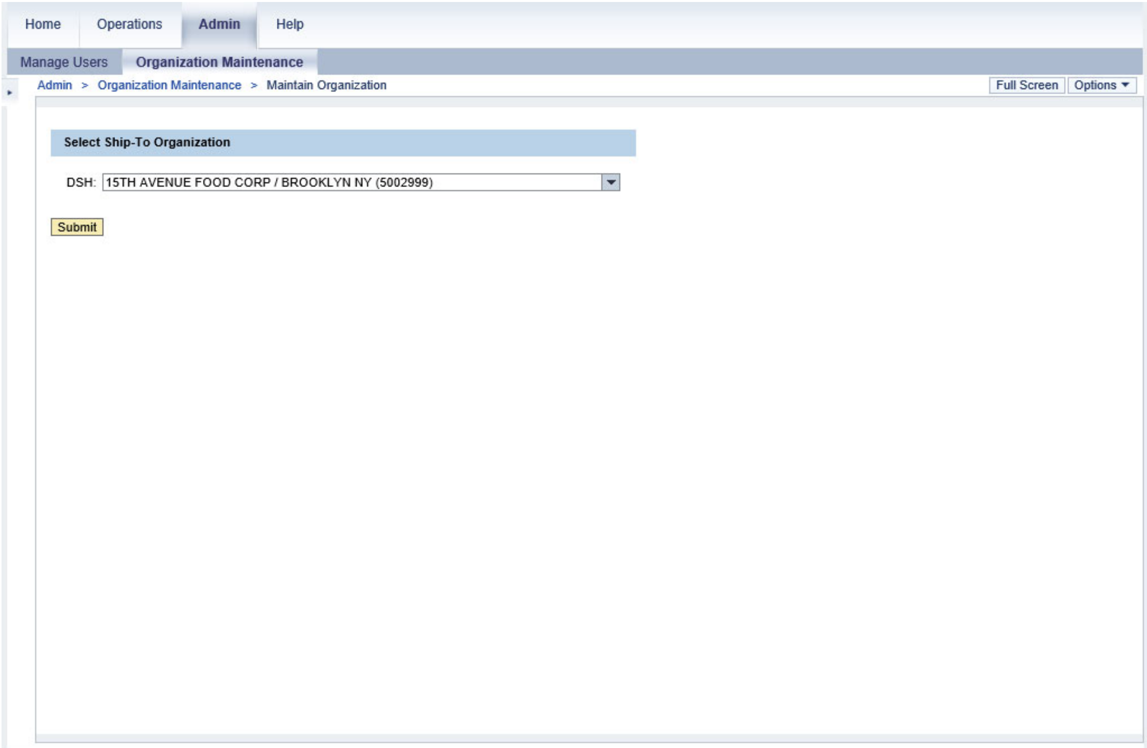
2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

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

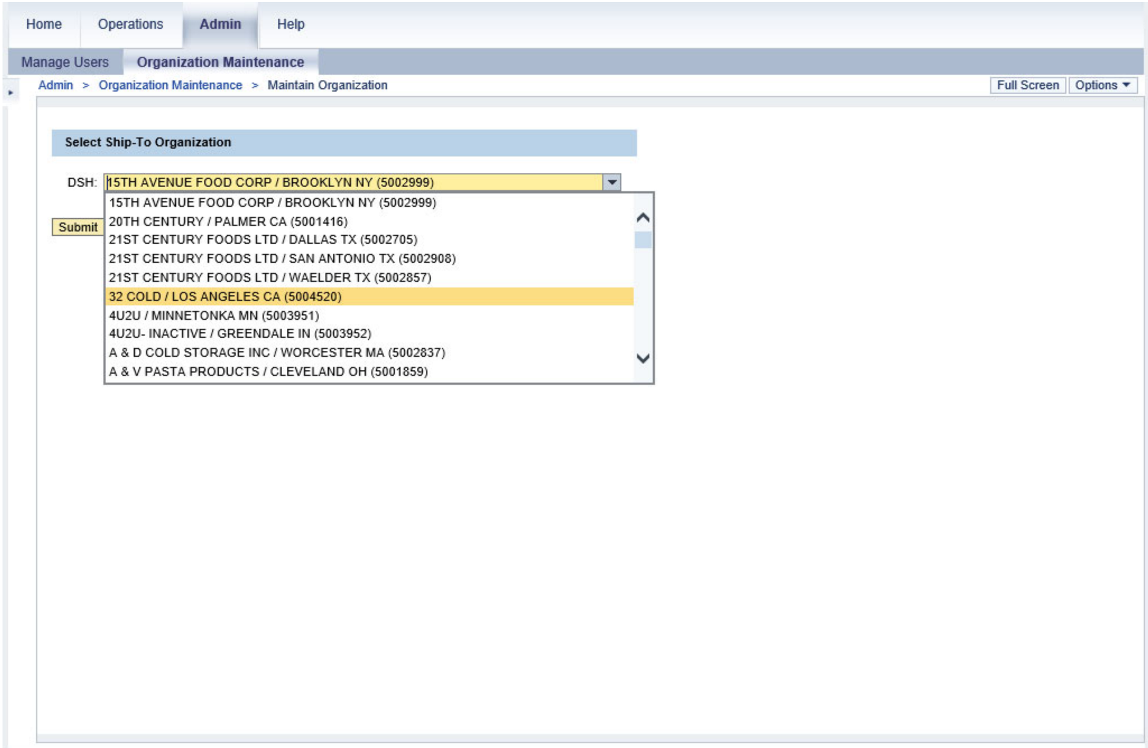


4. Click (the **DSH:** drop-down) to view the available ship-to organizations assigned to SDA/ITO by FNS.

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

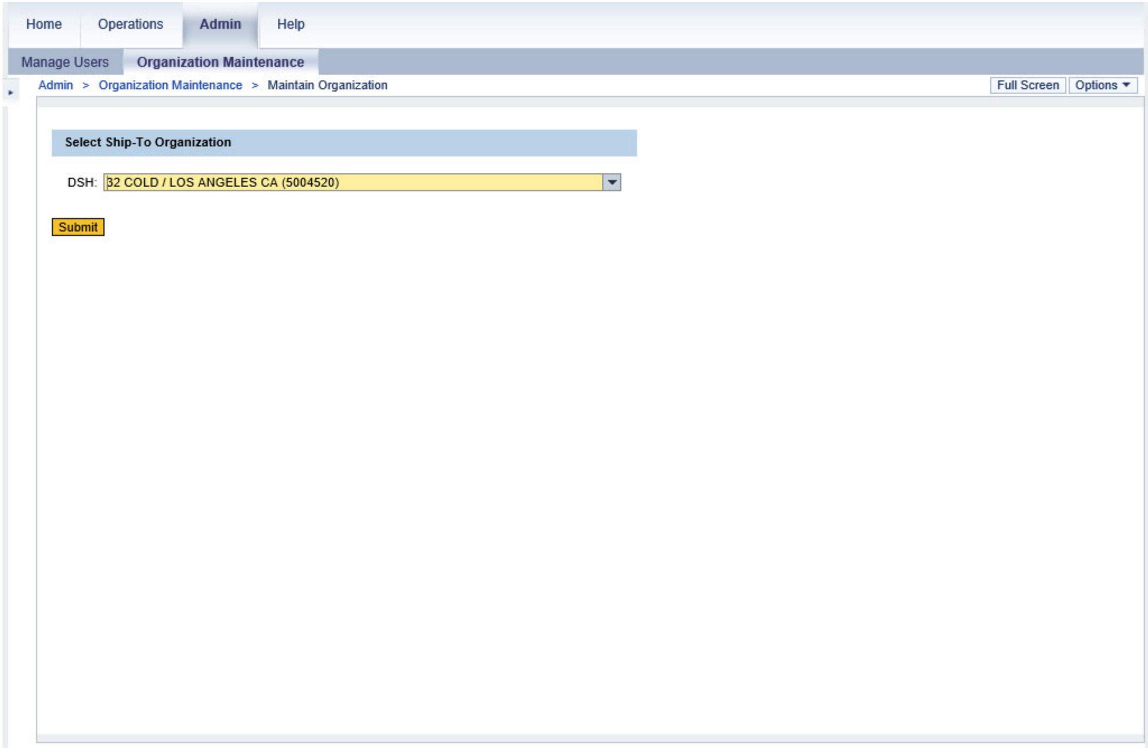
(Note) To request a new ship-to organization for the SDA/ITO, domestic business partners should email FNS at WBSCM-Ship-To@fns.usda.gov. FNS will create or modify the ship-to organization, as needed, and assign it to the organization.

Maintain Organization Screen



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

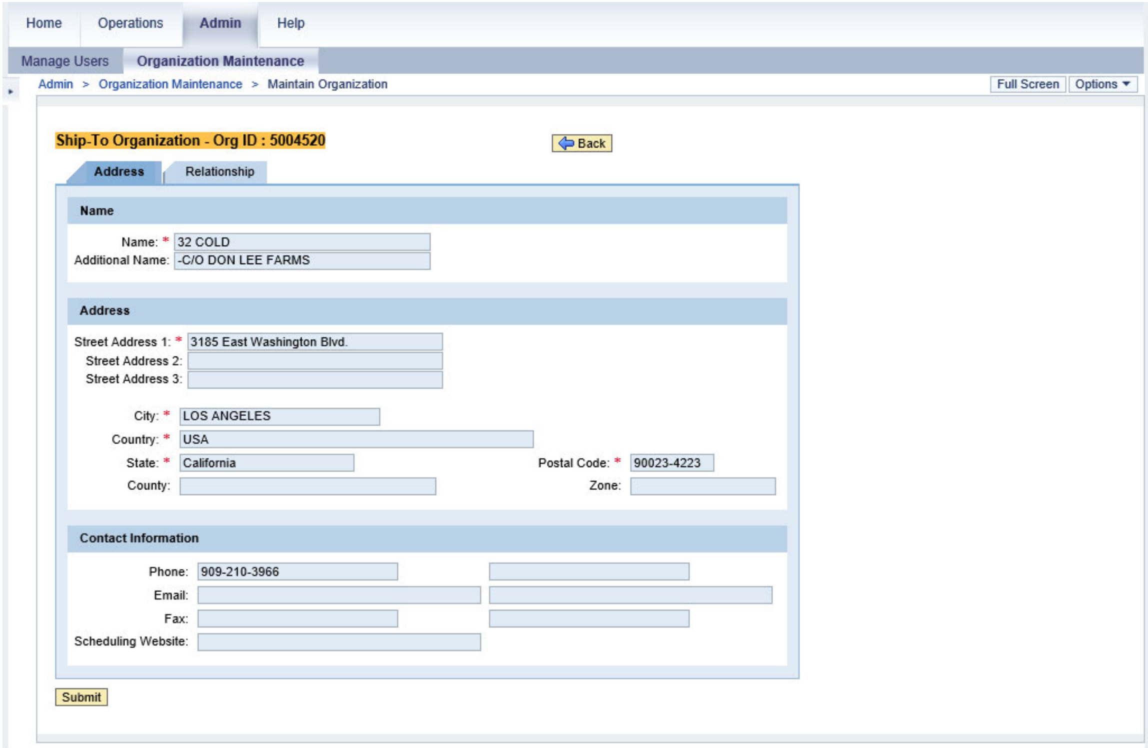


6. Click Submit (the **Submit** button) to submit the selection.

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

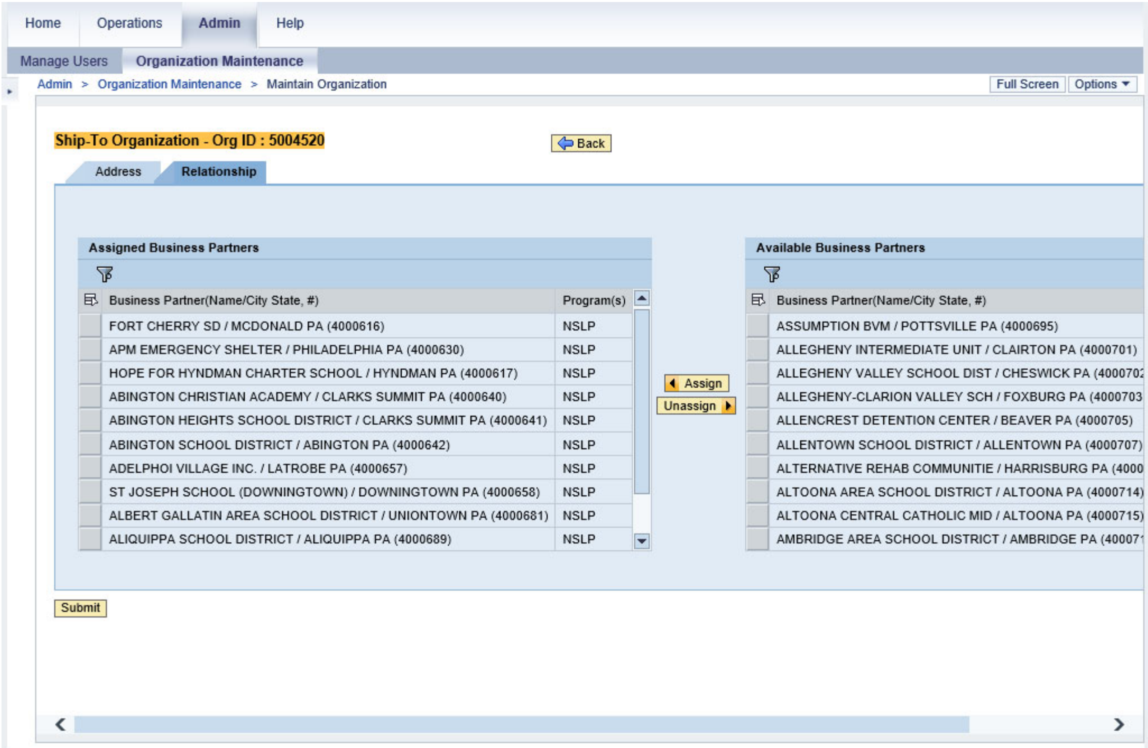
Maintain Organization Screen



7. Click 

(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.

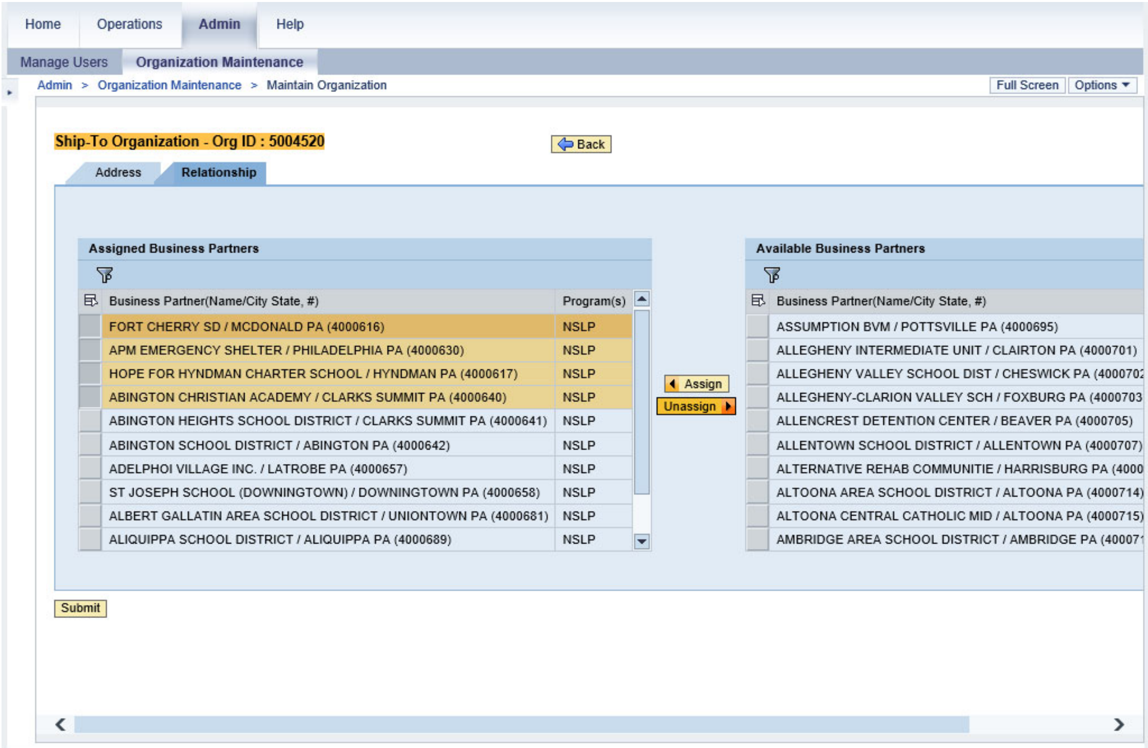
(Note) To select multiple business partners:

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)**.

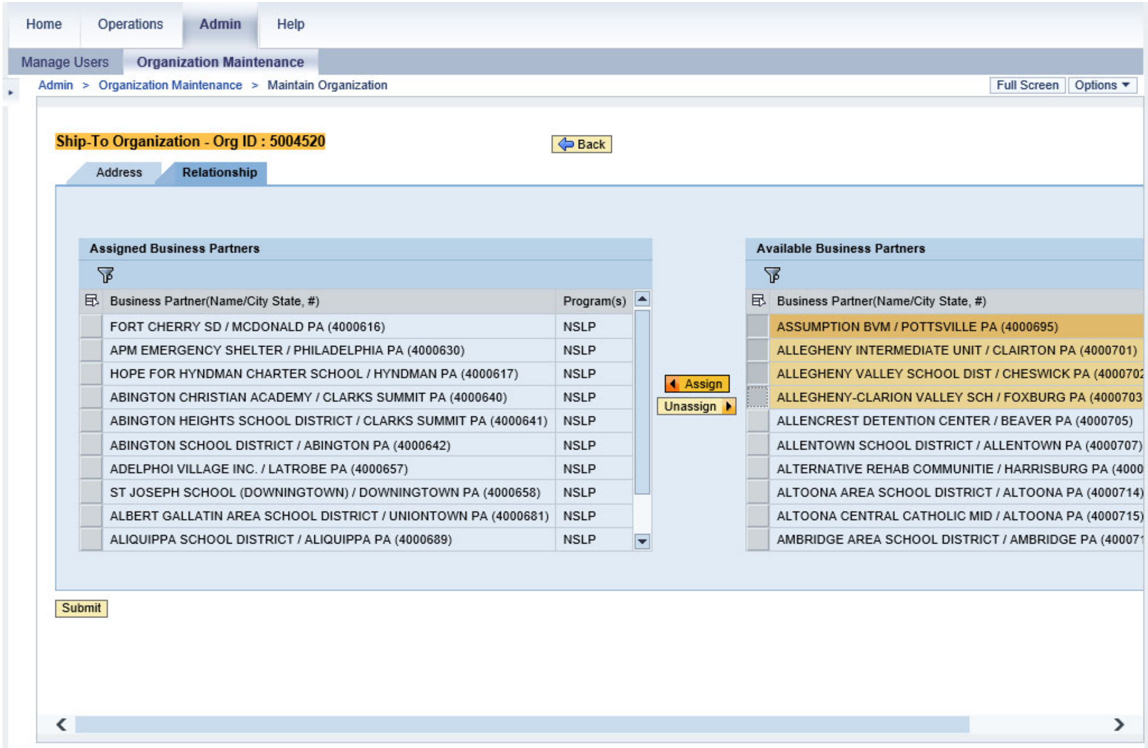
(Note) Use (the **Filters** icon) to quickly search for an RA. Additionally, use "*" (the **Asterisk** symbol) as a wildcard at the beginning of the search term (e.g., *DEPT) to search for an RA that starts with the term or use the asterisk symbol at the beginning and the end of the search term (e.g.,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

10. Click Unassign (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)**.

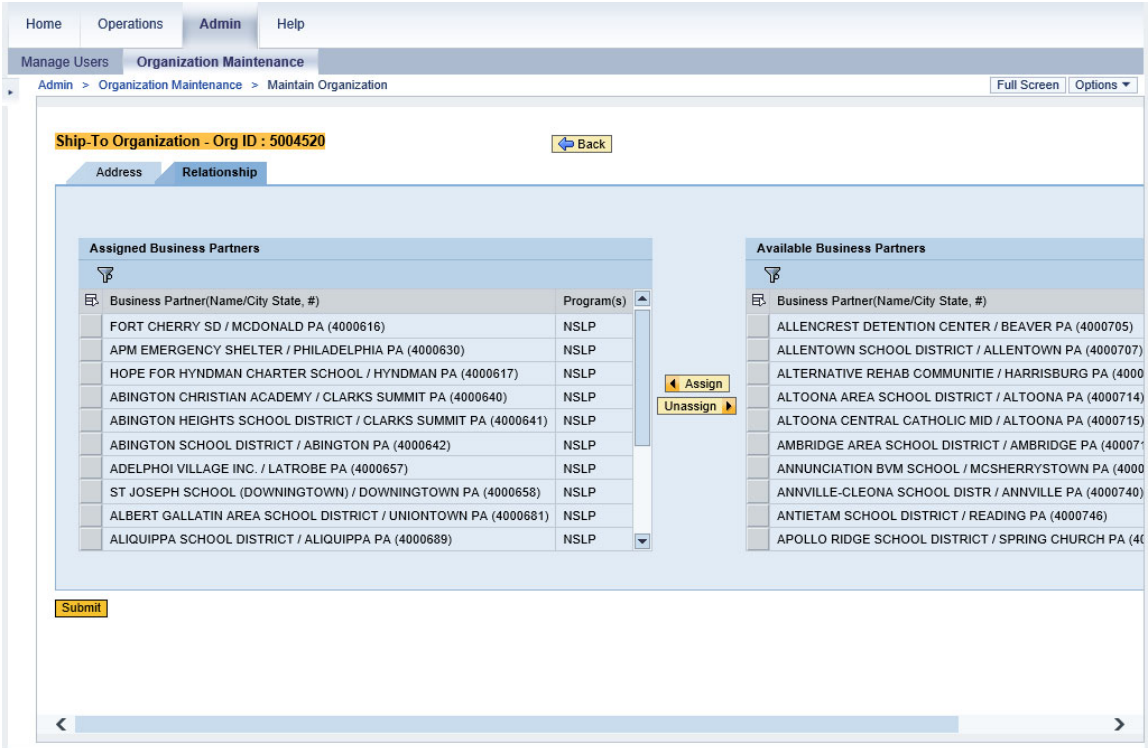
(Note) Use (the **Filters** icon) to quickly search for an RA. Additionally, use "*" (the **Asterisk** symbol) as a wildcard at the beginning of the search term (e.g., *DEPT) to search for an RA that starts with the term or use the asterisk symbol at the beginning of the term.

13. Click Assign (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.

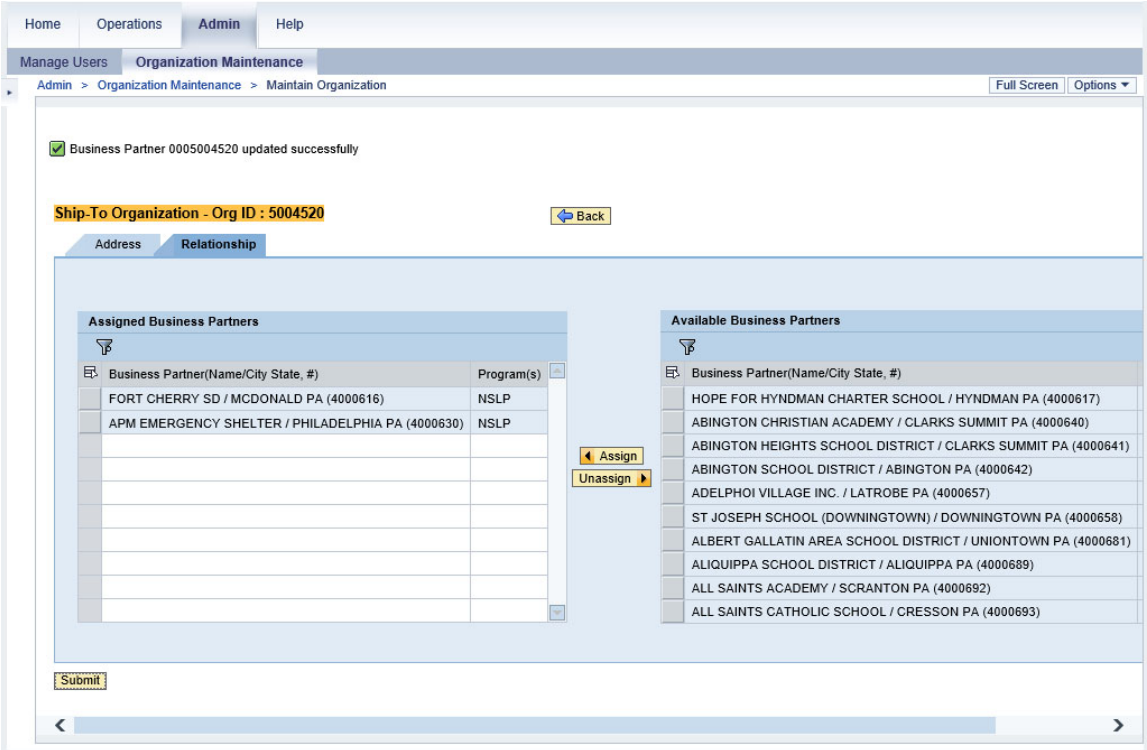
14. Go to Step 8.

Maintain Organization Screen



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

Maintain Organization Screen



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.

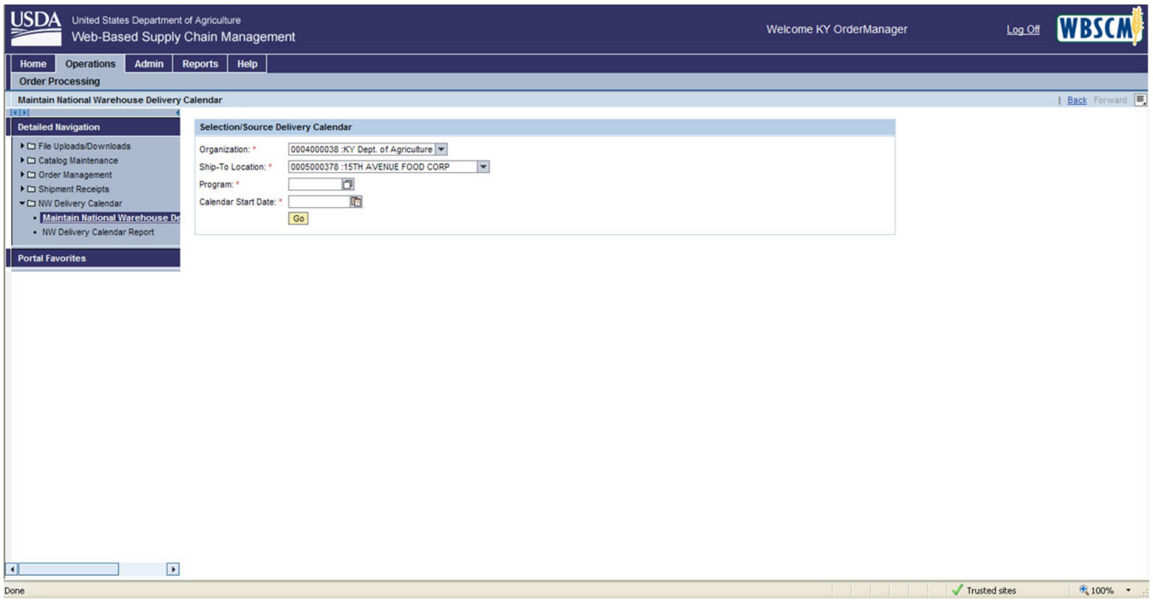
Reminders

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

PROCEDURE

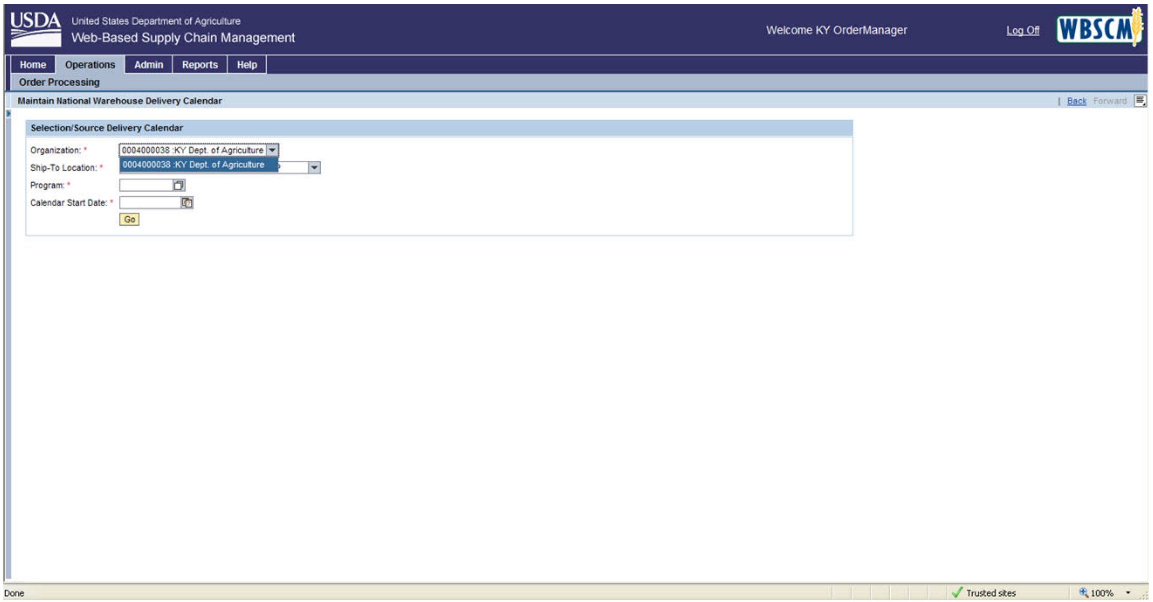
1. Start the transaction using the following Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **NW Delivery Calendar** folder ➔ **Maintain National Warehouse Delivery Calendar**

Maintain National Warehouse Delivery Calendar Screen



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

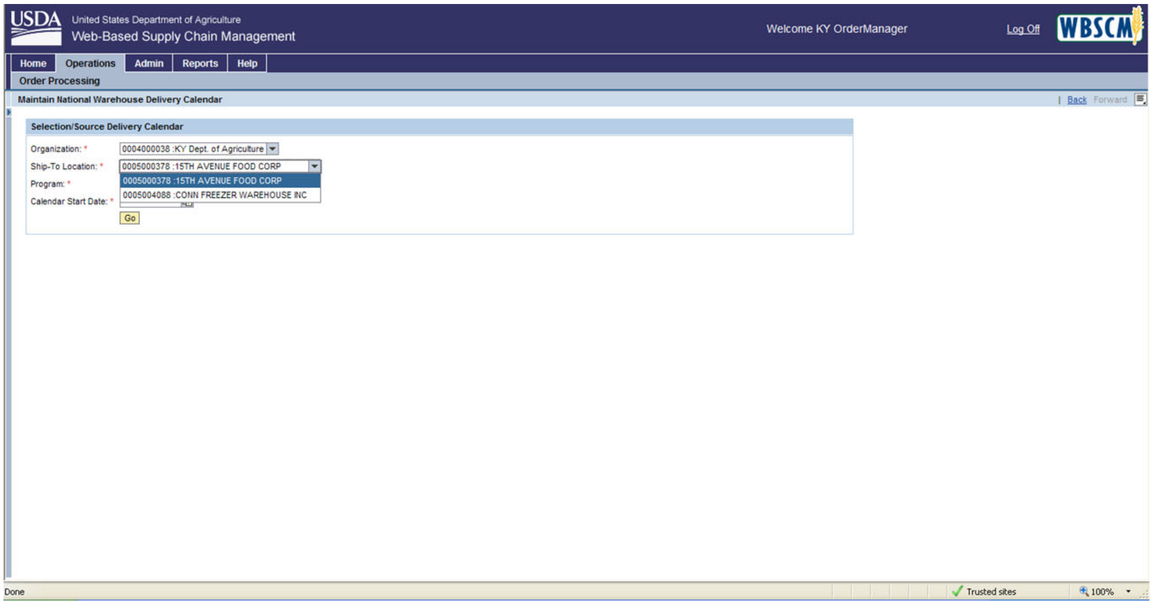
Maintain National Warehouse Delivery Calendar Screen



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.

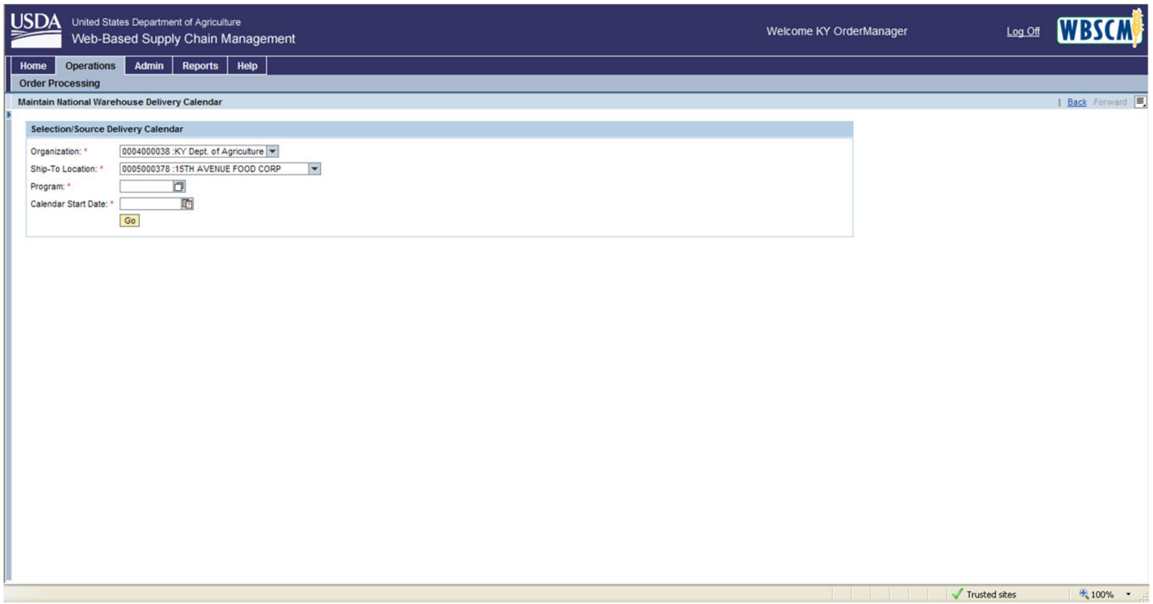
Maintain National Warehouse Delivery Calendar Screen



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.

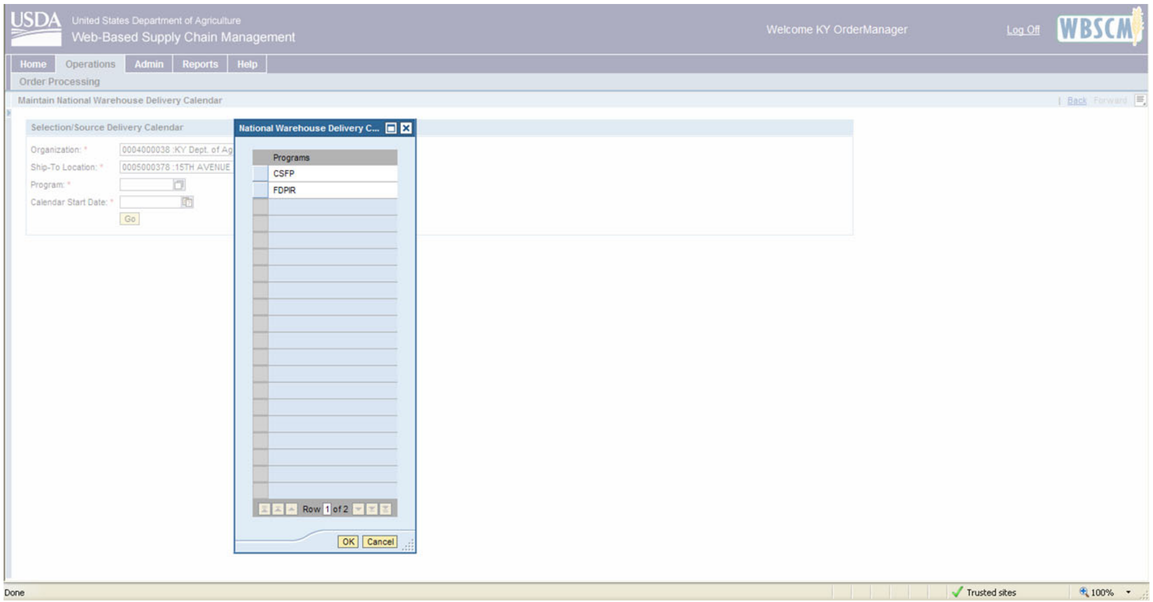
Maintain National Warehouse Delivery Calendar Screen



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

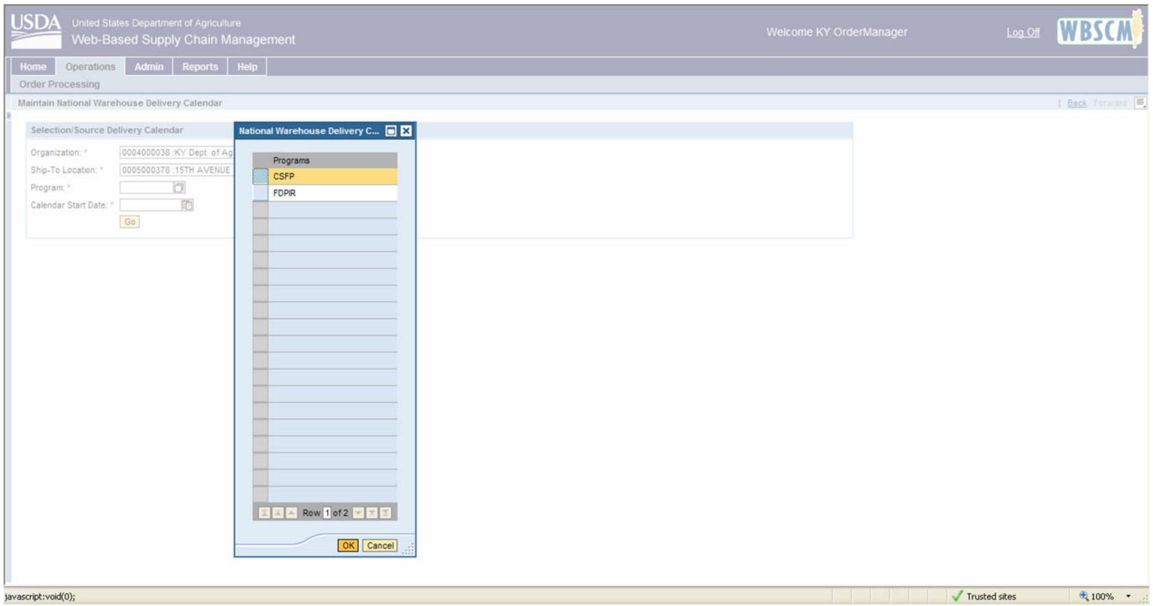
(Note) You can enter the program abbreviation directly into the field. For example, CSFP.

Maintain National Warehouse Delivery Calendar Screen



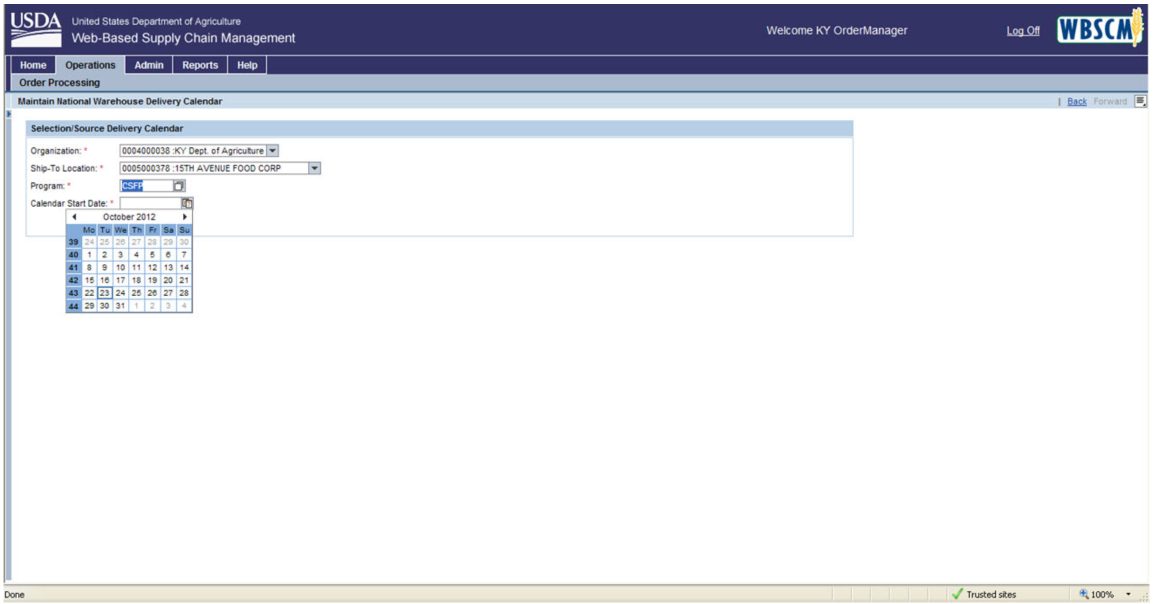
6. Click (the **Blue Box**) next to the appropriate program option. In this case, we selected the **CSFP** option.

Maintain National Warehouse Delivery Calendar Screen



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

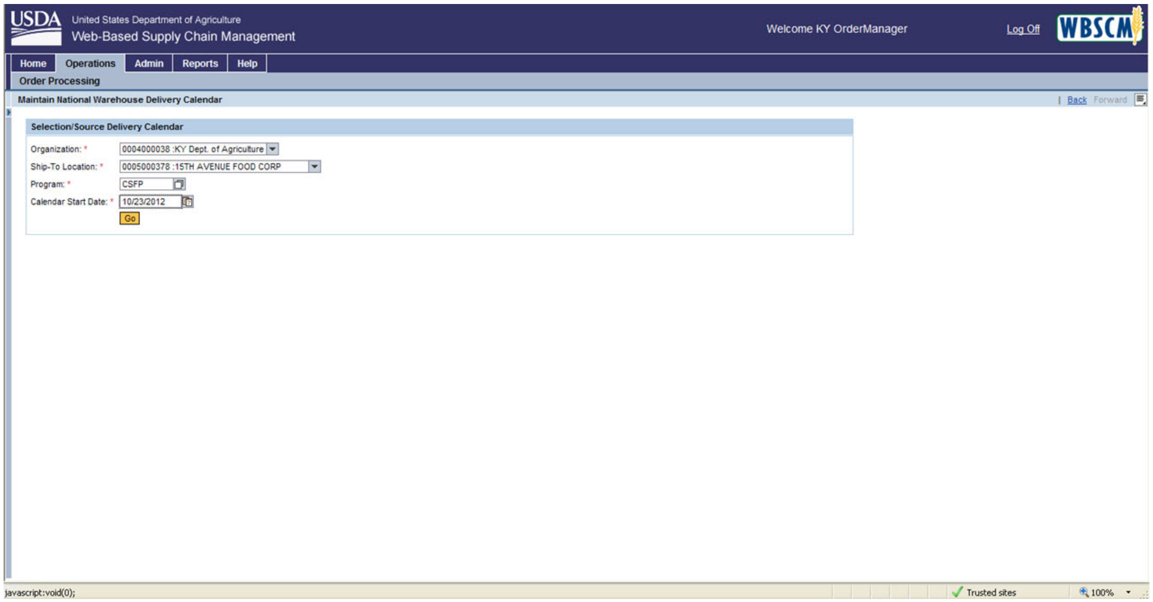
Maintain National Warehouse Delivery Calendar Screen



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

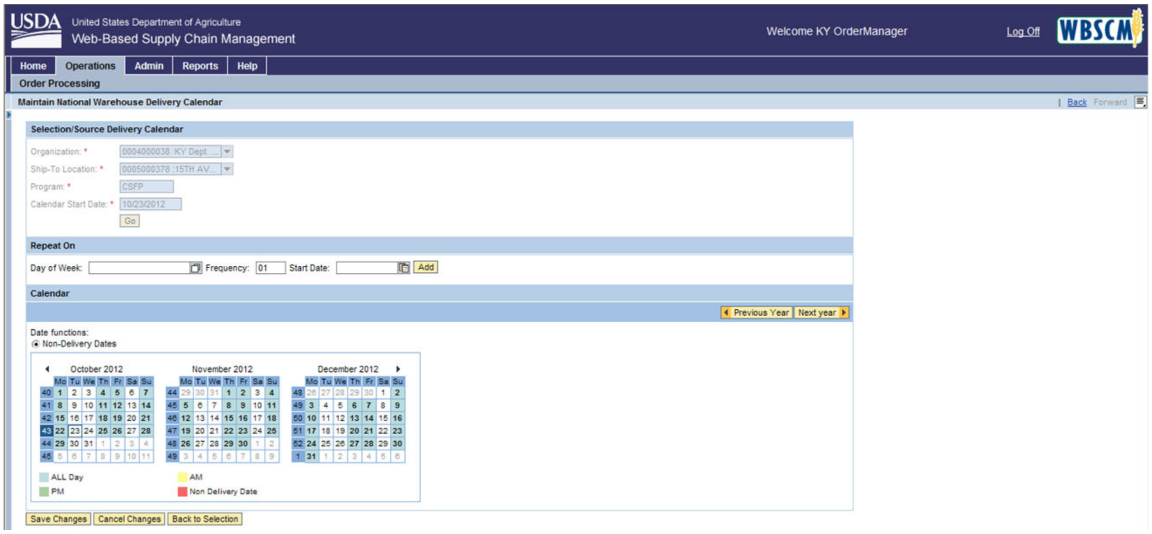
(Note) You can enter the date directly in the **Calendar Start Date** field.

Maintain National Warehouse Delivery Calendar Screen



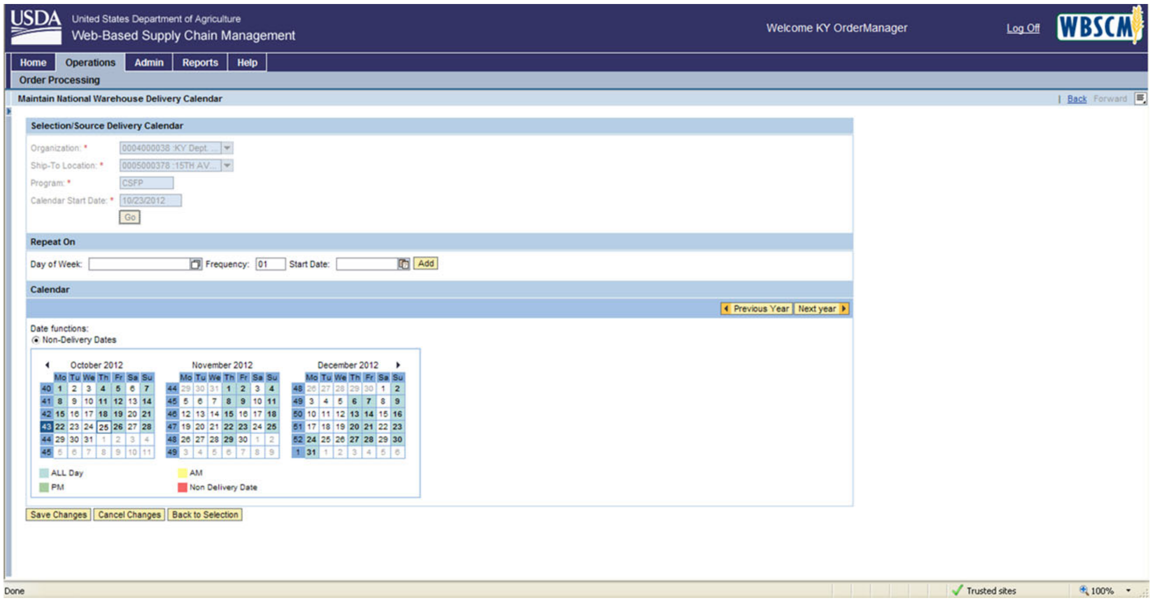
9. Click Go (the **Go** button) to display a calendar that corresponds to the Organization, Ship To Location, Program, and Calendar Start Date listed in your criteria.

Maintain National Warehouse Delivery Calendar Screen



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

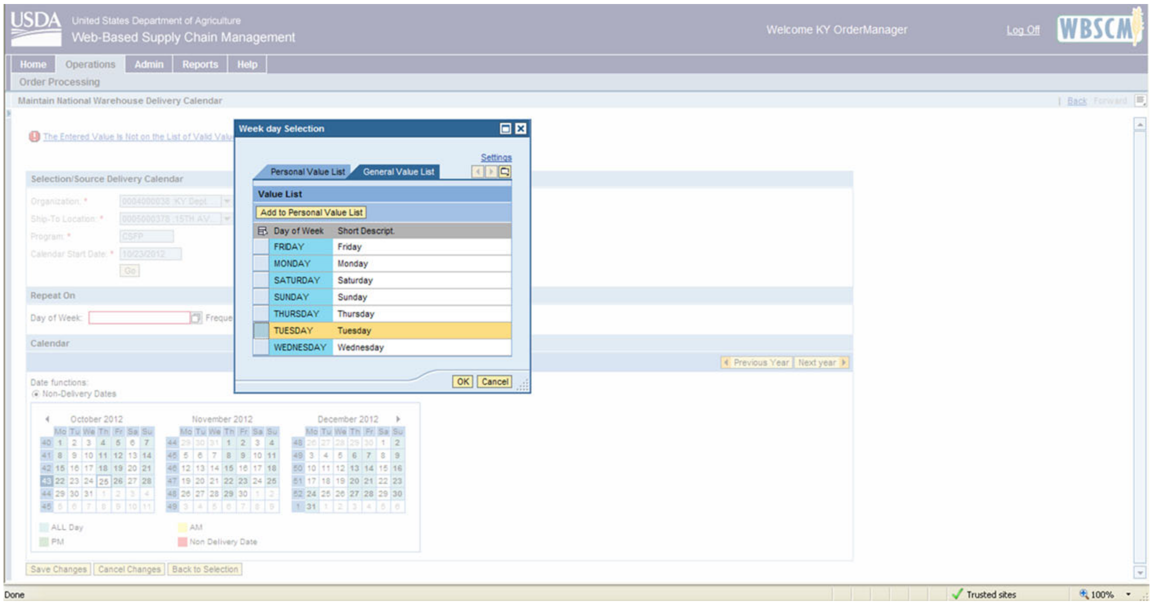


11. Click (the **Matchcode** button) next to the **Day of the Week** field to select a non-delivery day of the week or enter the day directly into the field.

As required, complete/review the following fields:

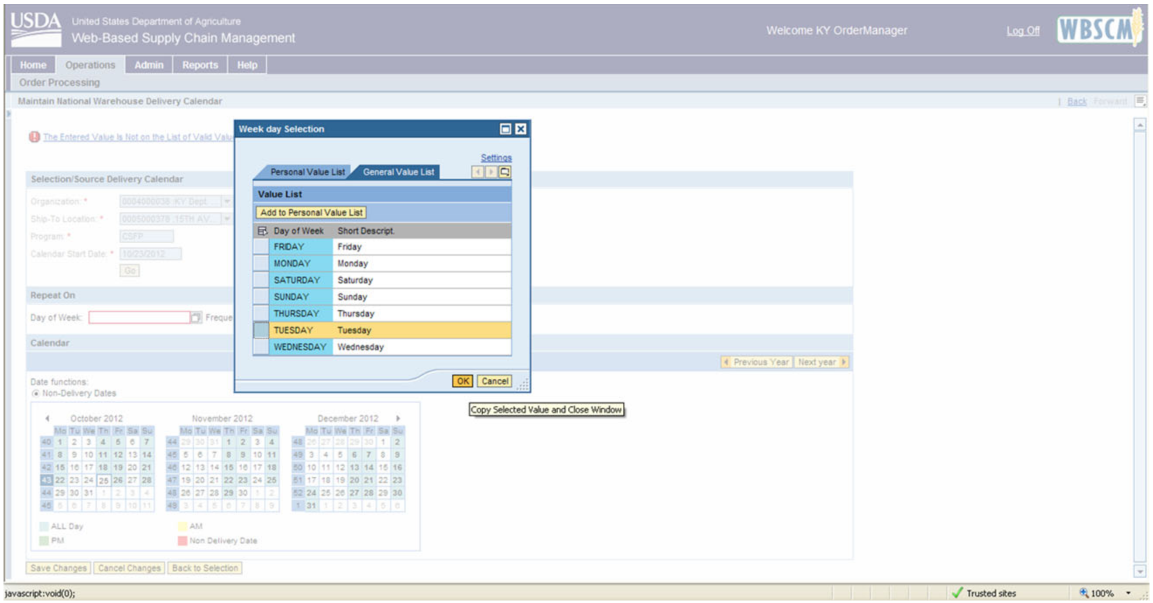
Field	R/O/C	Description
Day of the Week:	R	Day of week when you do not want to receive deliveries. This could be a recurring date (i.e. I do not want to receive deliveries on any Tuesday in the winter) or one-time dates (i.e. I do not want to receive deliveries on Tuesday, the 30th of October). Example: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

Maintain National Warehouse Delivery Calendar Screen



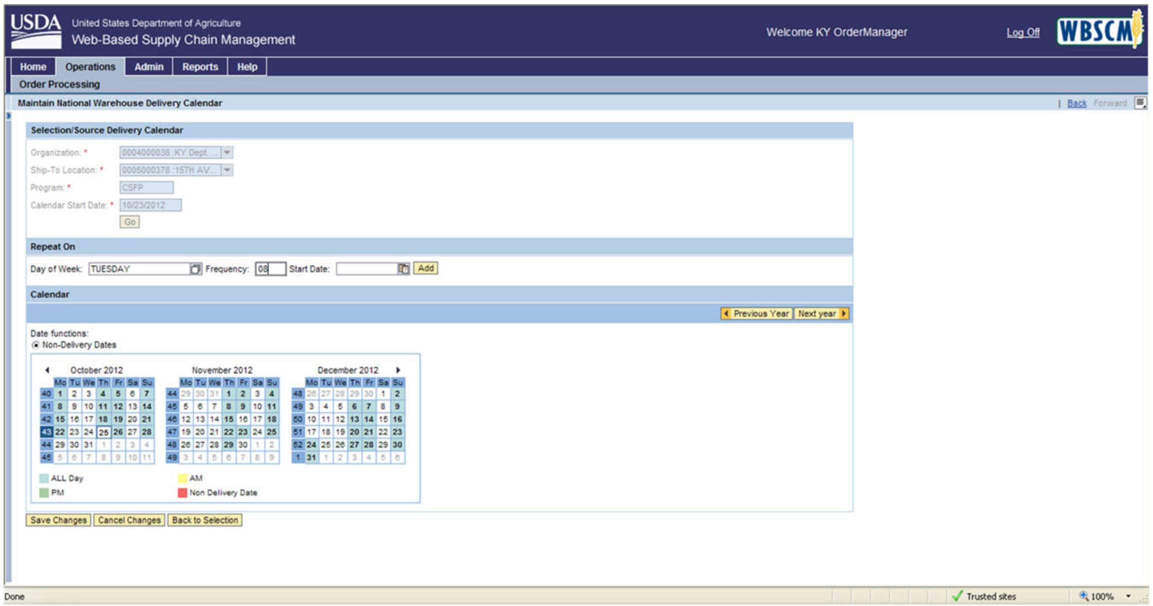
12. Click (the **Blue Box**) next to the appropriate day option. In this case, we selected the **Tuesday** option.

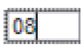
Maintain National Warehouse Delivery Calendar Screen



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

Maintain National Warehouse Delivery Calendar Screen

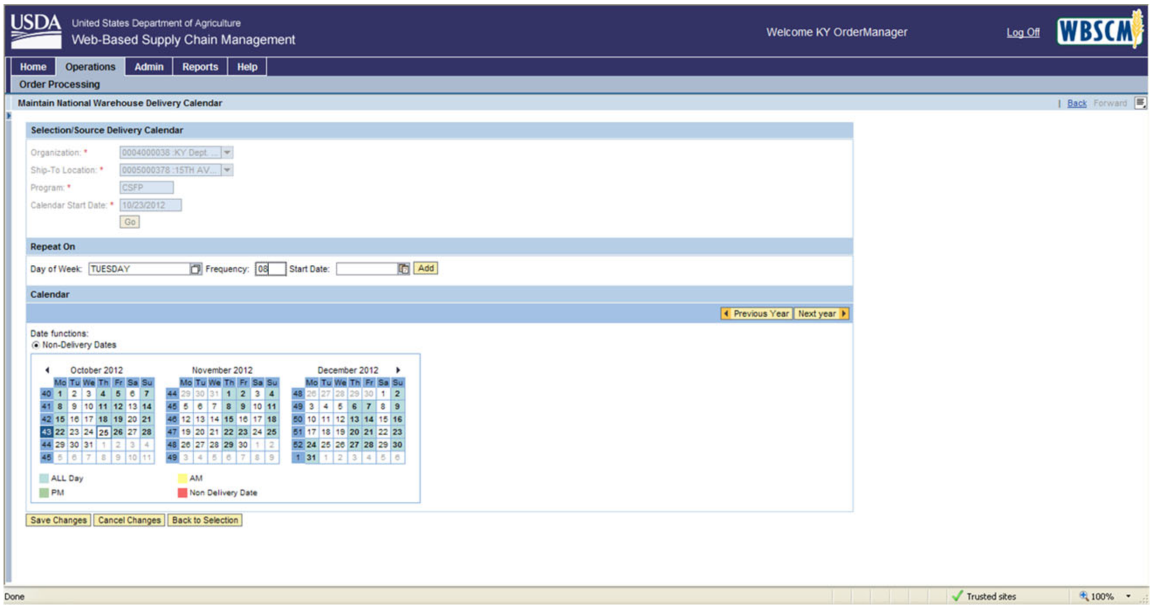


14. Click  (the **Frequency** text box) to enter the frequency. In this case, we entered 08 in the text box.

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

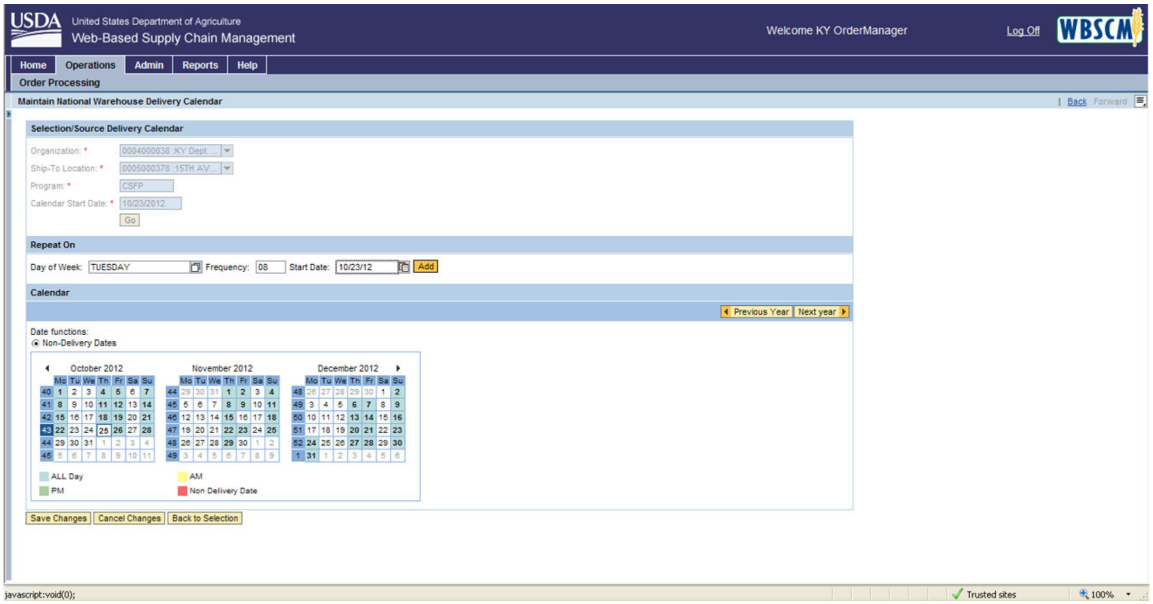


15. Click  (the **Start Date** text box) to enter the start date orclick the calendar icon to select a date from the calendar. In this case, we entered 10/23/12.

As required, complete/review the following fields:

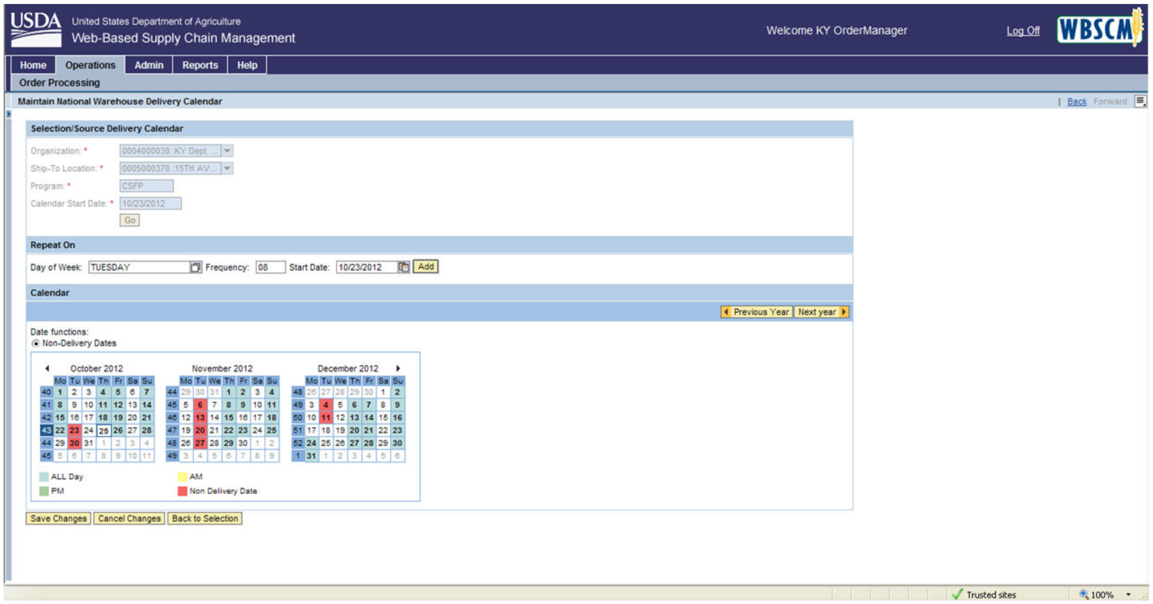
Field	R/O/C	Description
Start Date	R	Date when the non-delivery dates should start. By entering 10/23/2012 in this field, we have indicated that the eight Tuesdays following 10/23/2012 will be blocked out as non-delivery dates. Example: 10/23/2012

Maintain National Warehouse Delivery Calendar Screen



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

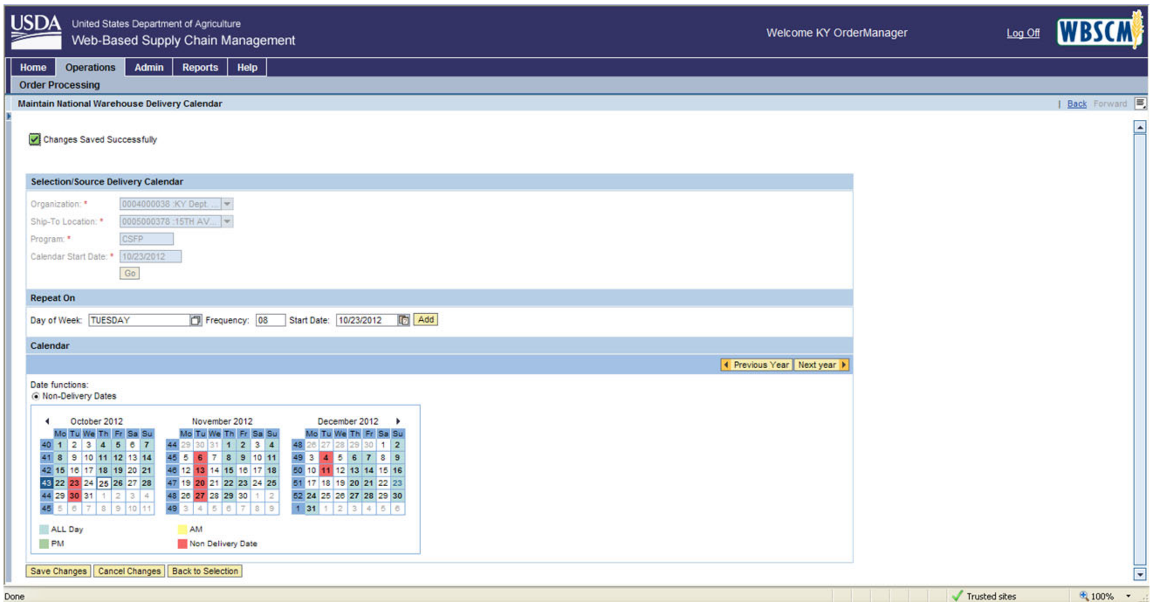
Maintain National Warehouse Delivery Calendar Screen



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

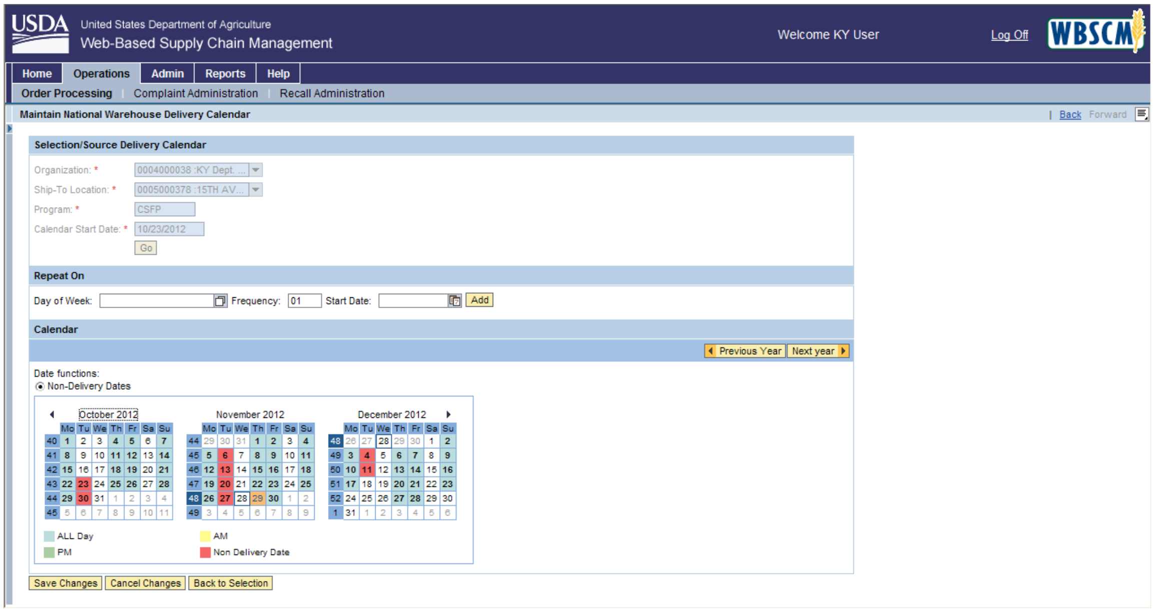
(Note) The non-delivery dates are indicated in red.

Maintain National Warehouse Delivery Calendar Screen



18. Confirmation Message Displays.

Maintain National Warehouse Delivery Calendar Screen

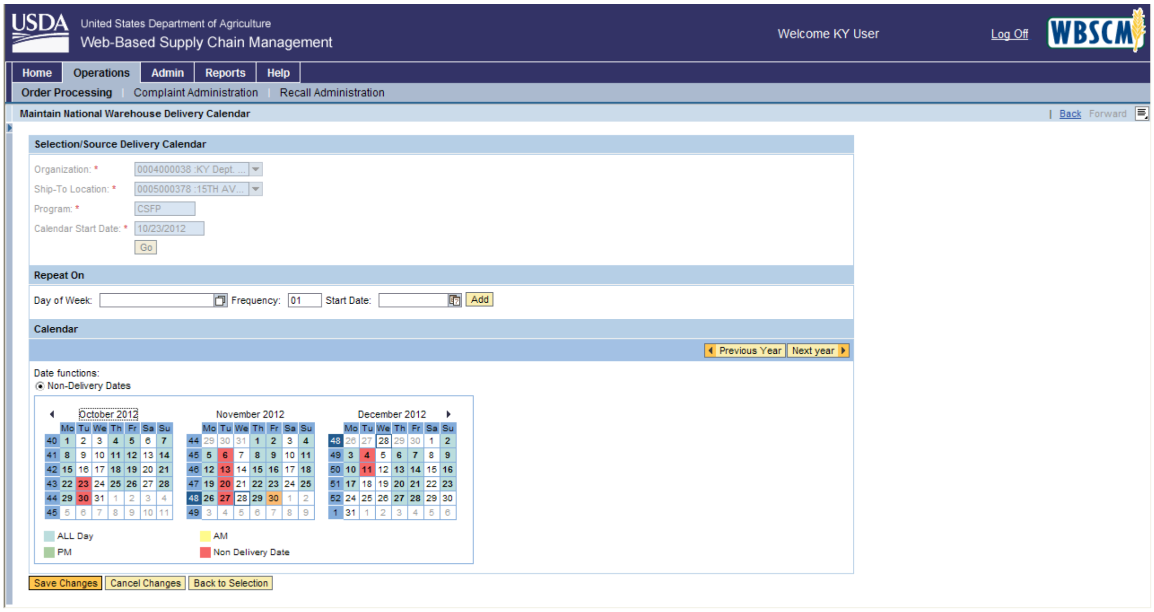


19. You can select individual non-delivery dates by clicking the dates directly on the calendar. The day will turn orange to identify that it has been selected. If you select multiple dates on the calendar this way, the previously selected date will change back to its initial status color.

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

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

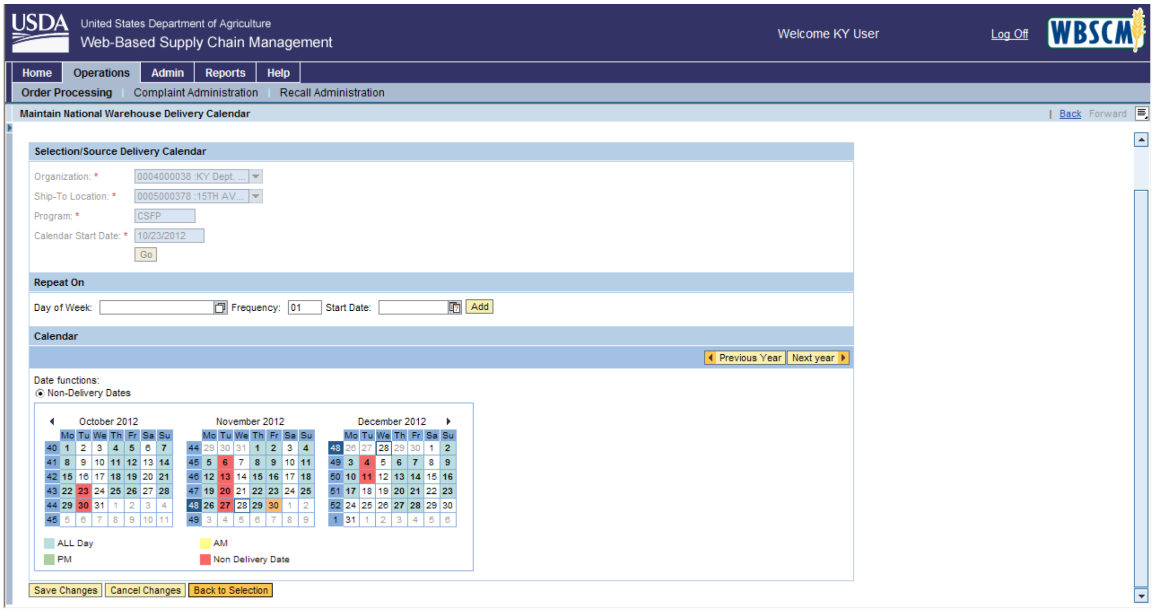
Maintain National Warehouse Delivery Calendar Screen



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

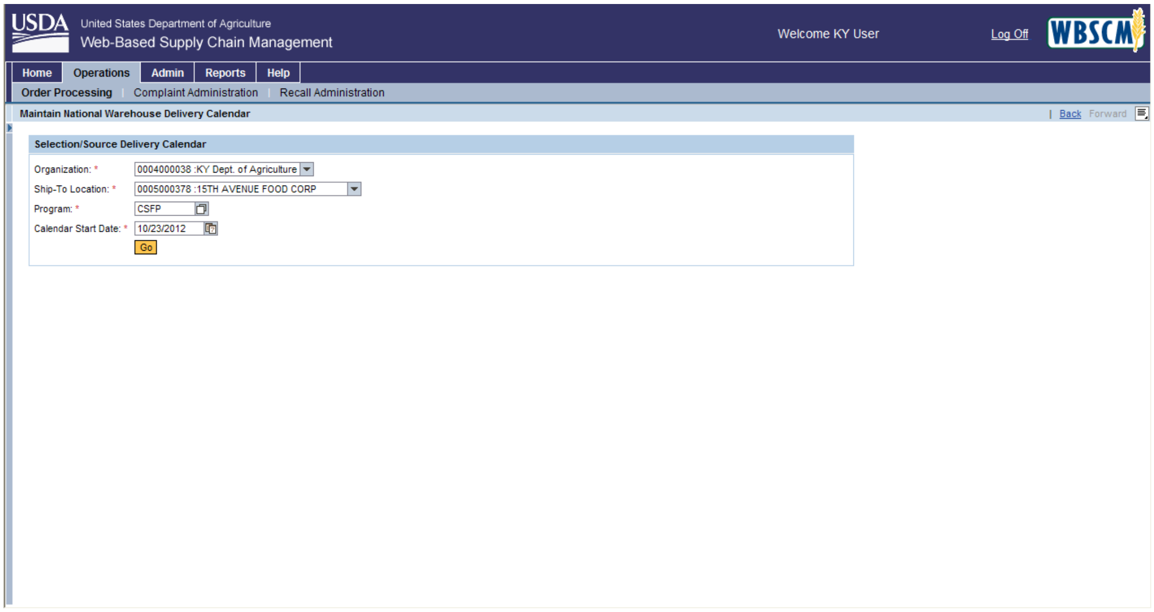
Click Save Changes (the **Save Changes** link).

Maintain National Warehouse Delivery Calendar Screen



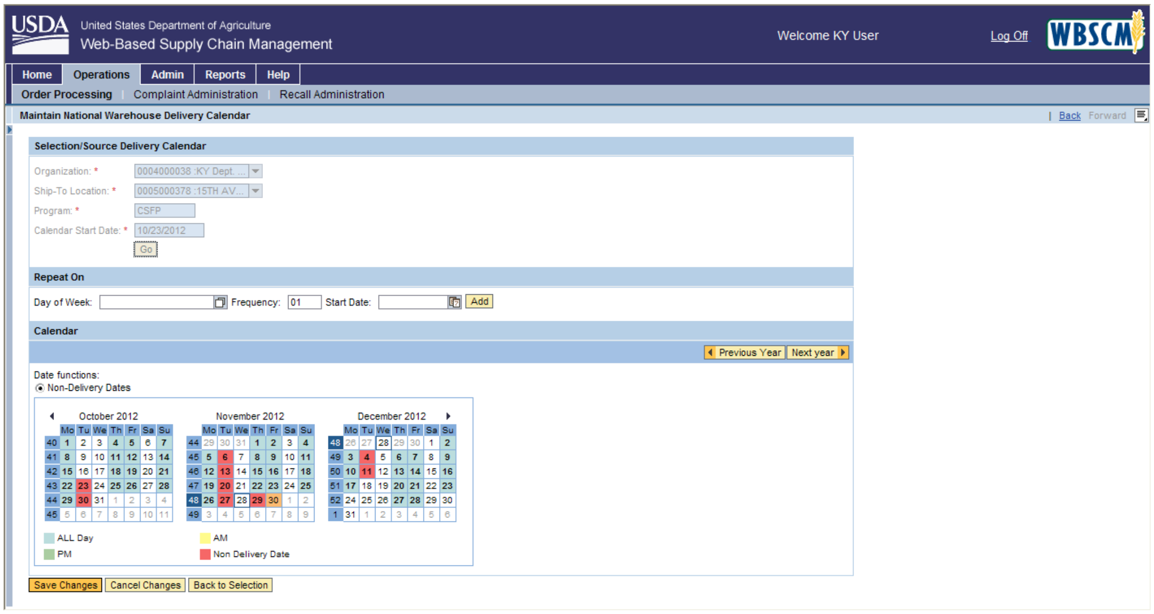
21. Click Back to Selection (the **Back to Selection** link).

Maintain National Warehouse Delivery Calendar Screen



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

Maintain National Warehouse Delivery Calendar Screen



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.)

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.

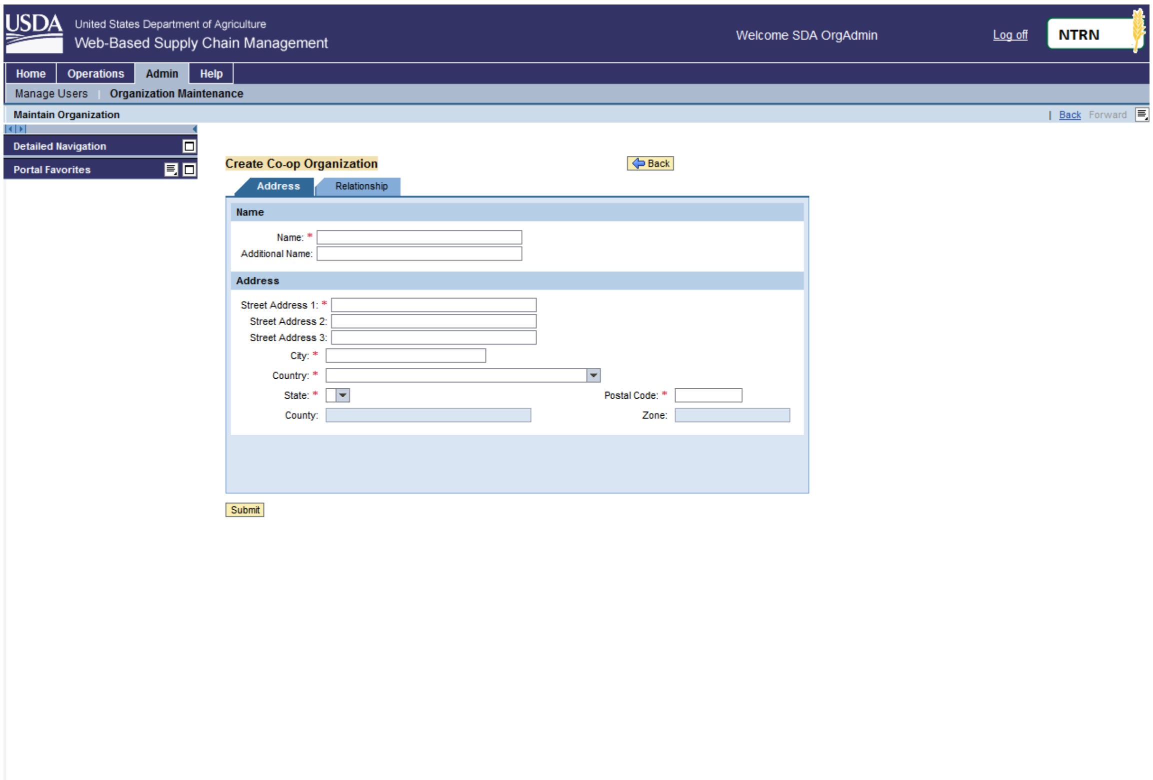
Reminders

- 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**

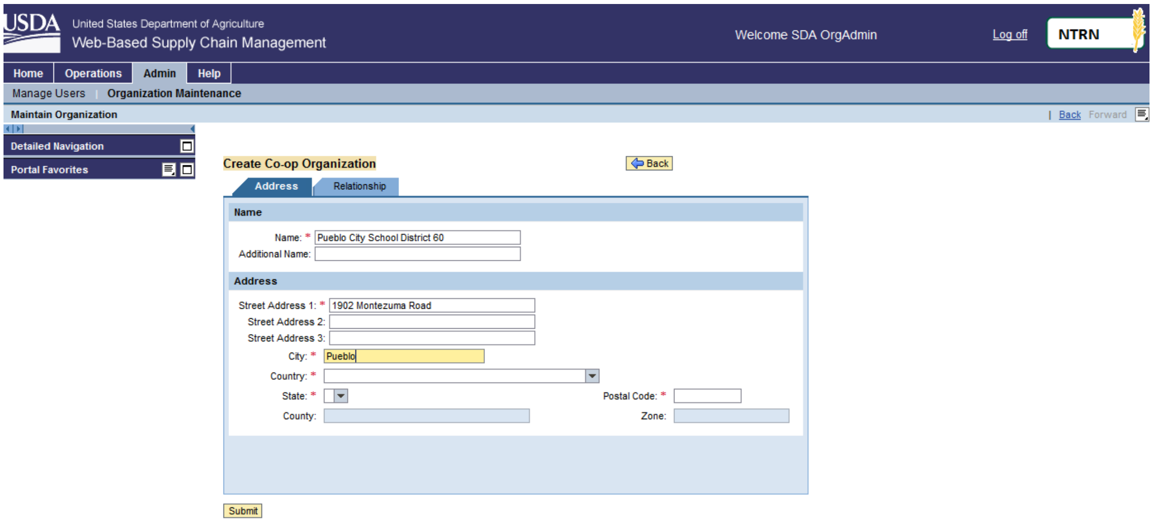
Create Co-op Organization Screen



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

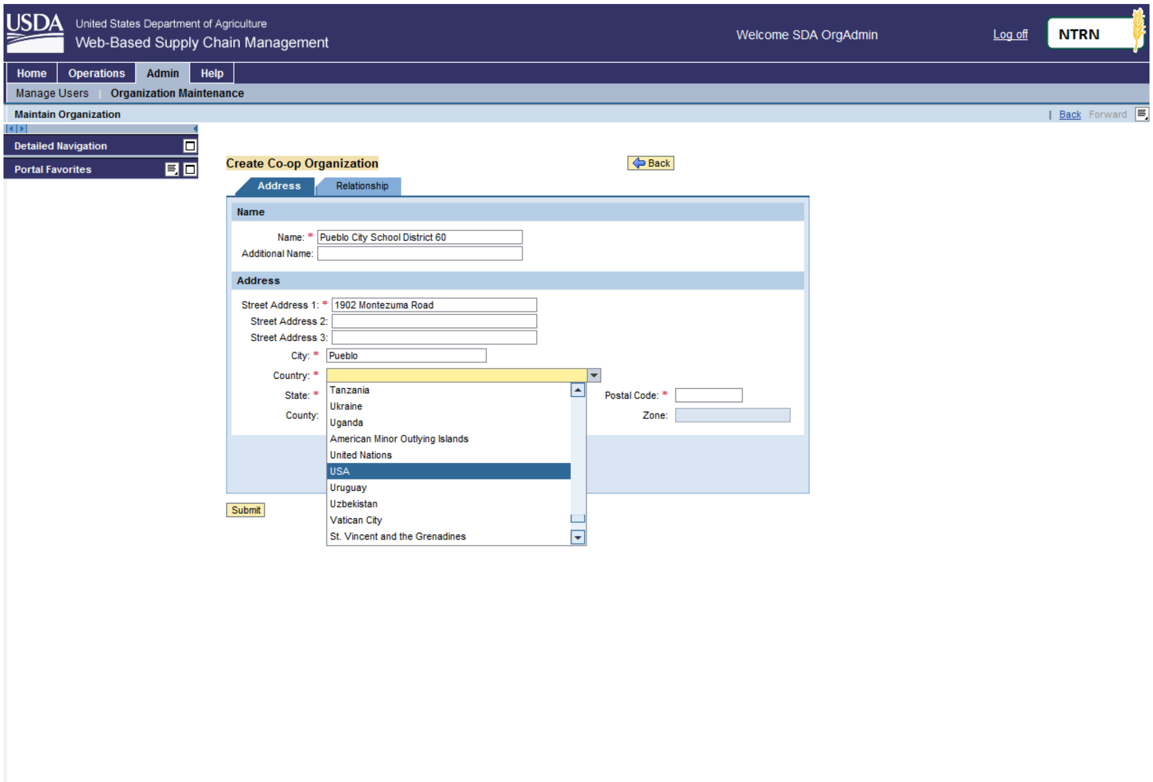
Field	R/O/C	Description
Name:	R	Person or company's name. **Example:** Pueblo City School District 60
Street Address:	R	**Example:** 1902 Montezuma Road
City:	R	City where the Co-op organization is located. **Example:** Pueblo

Create Co-op Organization Screen



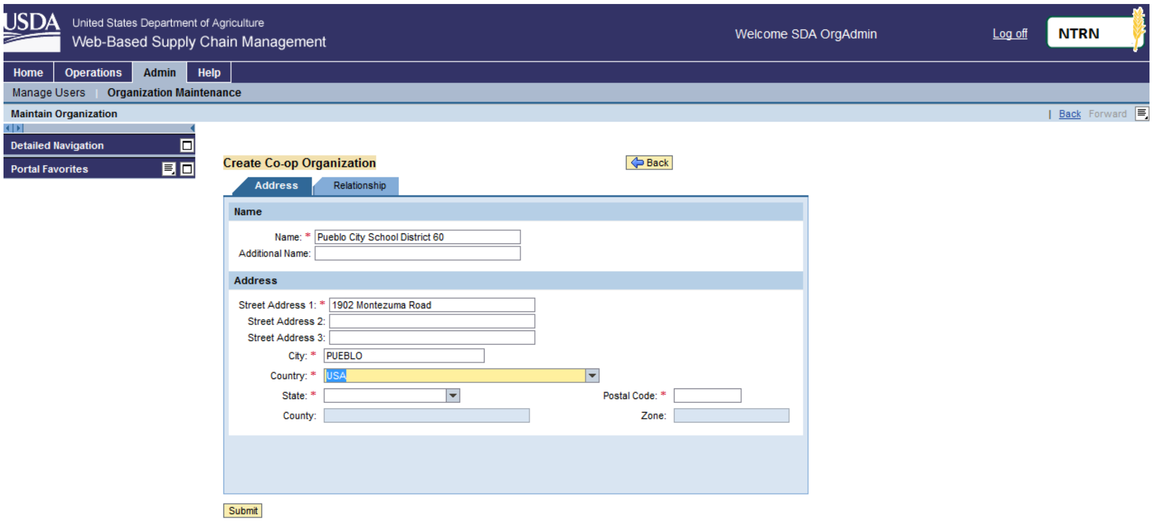
3. In the Country field, click on the (the **Dropdown** button) to select the country in which the new Co-op Organization is located.

Create Co-op Organization Screen



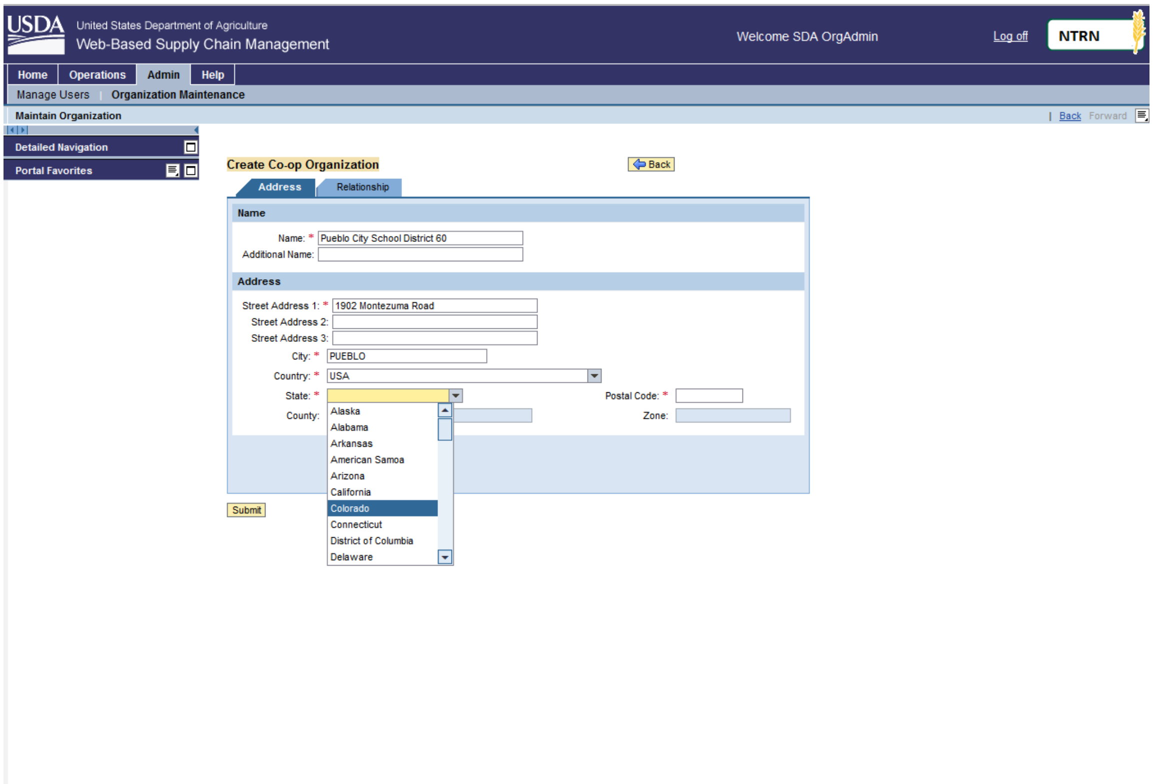
4. From the Dropdown list, select USA (the **USA** option) to establish this as the new Co-op Organization's country.

Create Co-op Organization Screen



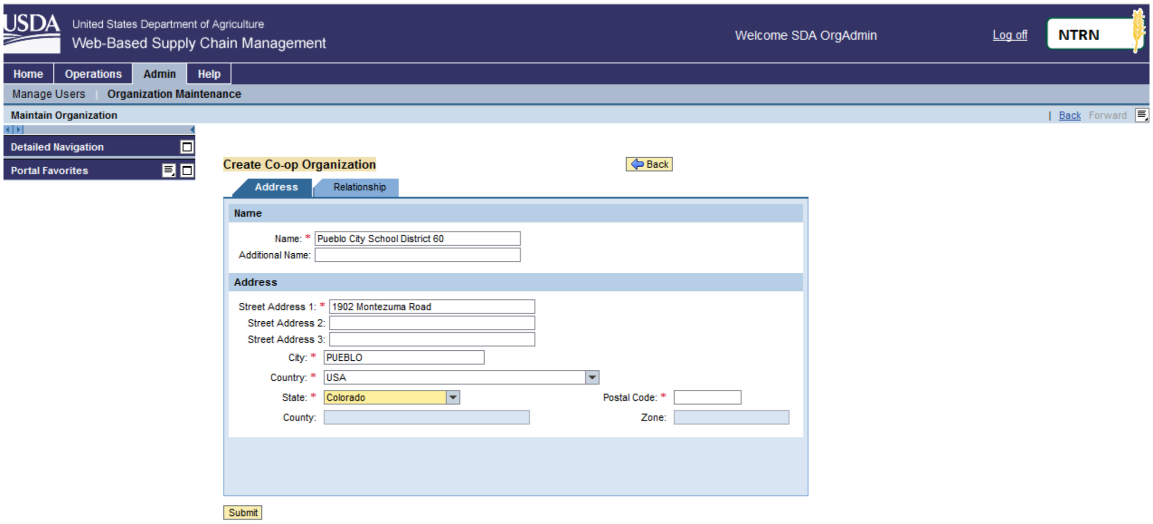
5. In the State field, click on the ▼ (the **Dropdown** button) to select the state in which the new Co-op Organization is located.

Create Co-op Organization Screen



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

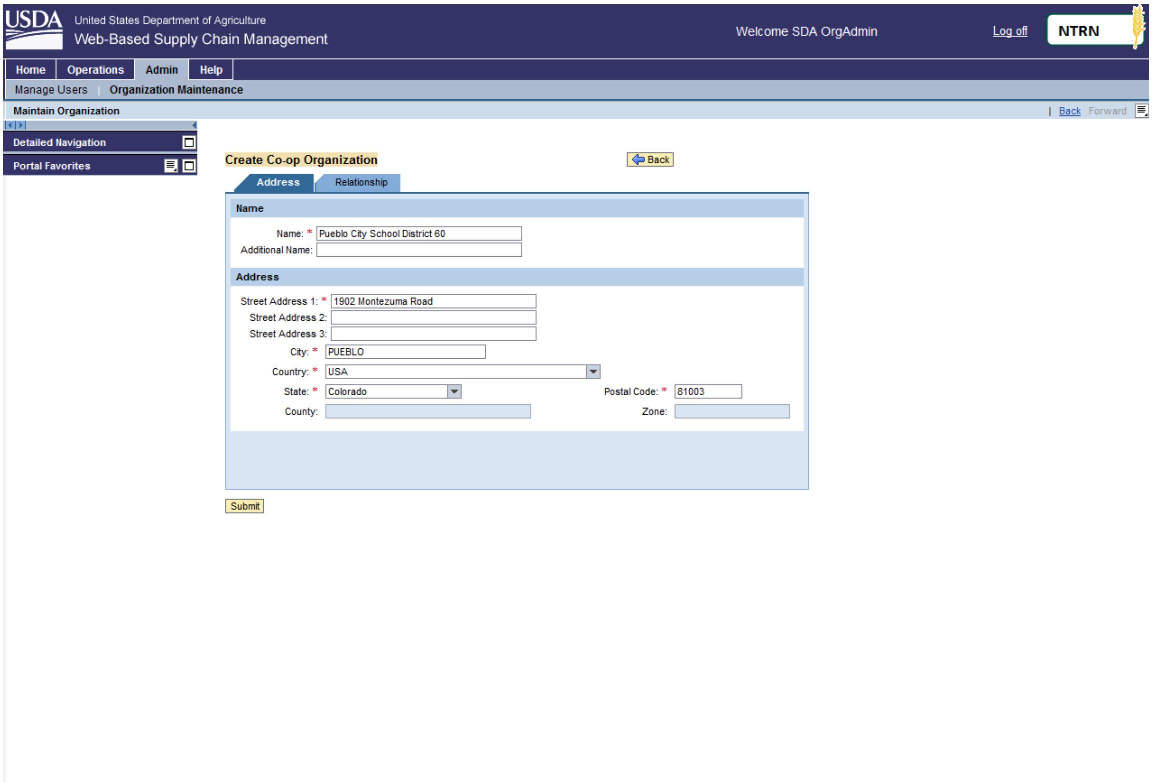
Create Co-op Organization Screen



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

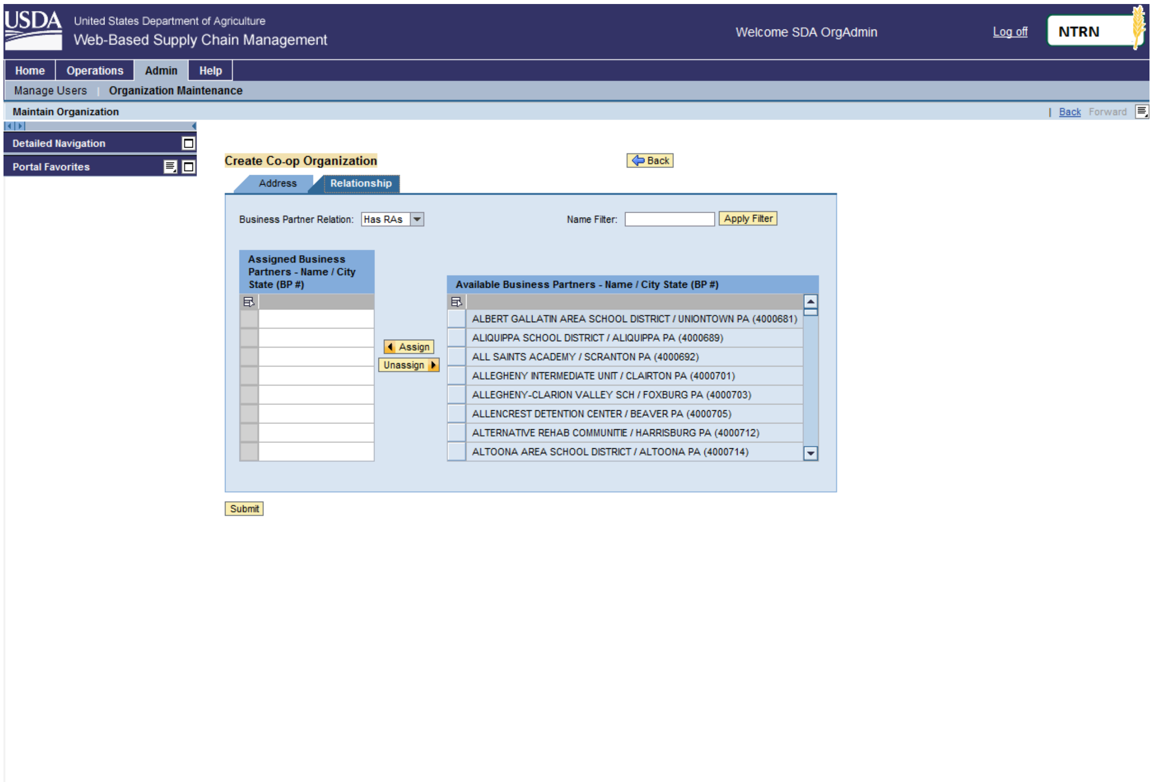
Field	R/O/C	Description
Postal code:	R	A postal code. **Example:** 81003

Create Co-op Organization Screen



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

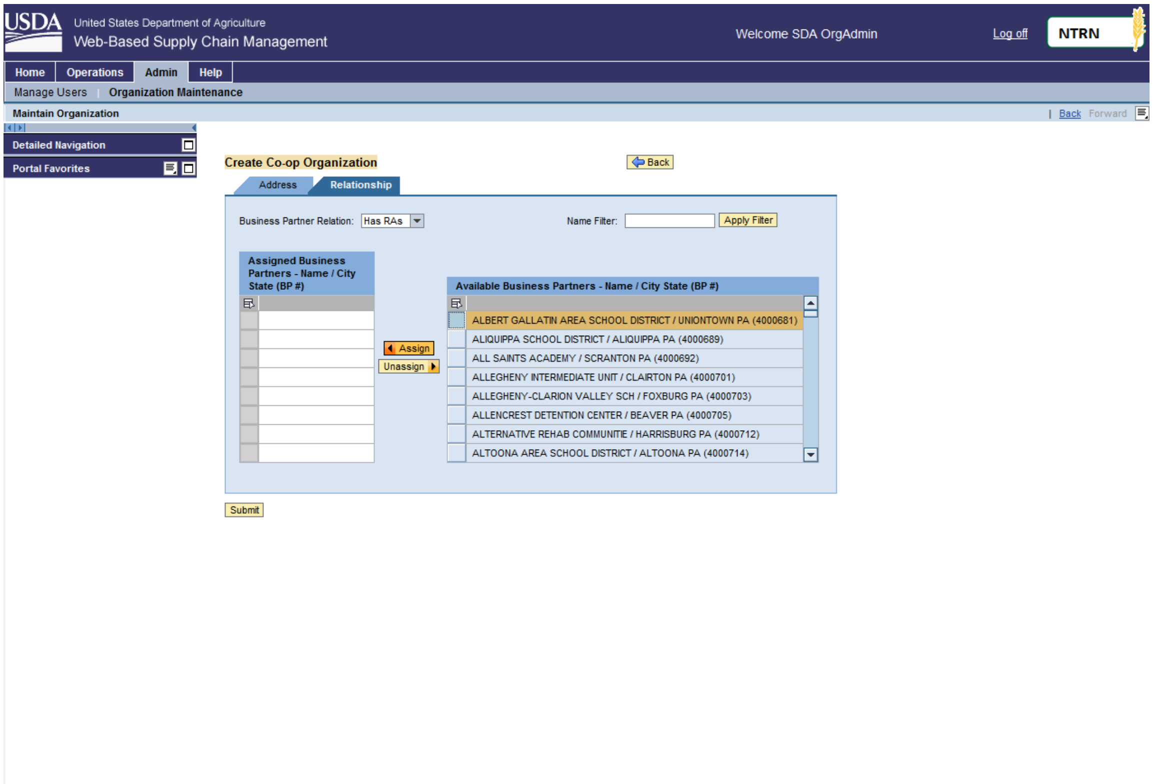
Create Co-op Organization Screen



9. 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.

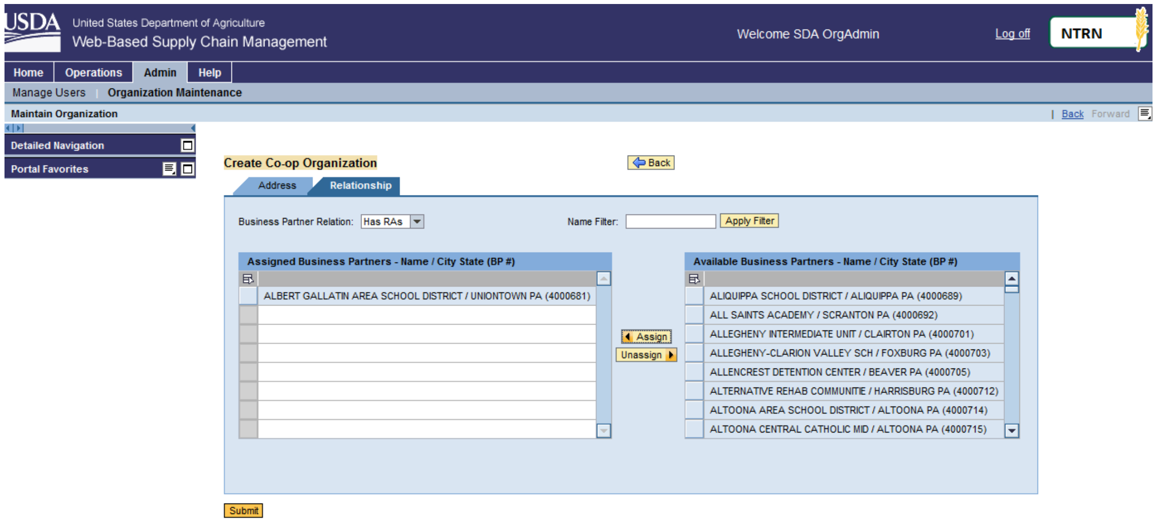
(Note) Using the Business Partner Relation drop-down, you can determine the type of Business Partner relationship you establish. Note that Co-ops only have one Business Partner Relation to choose from, which is "Has RAs".

Create Co-op Organization Screen



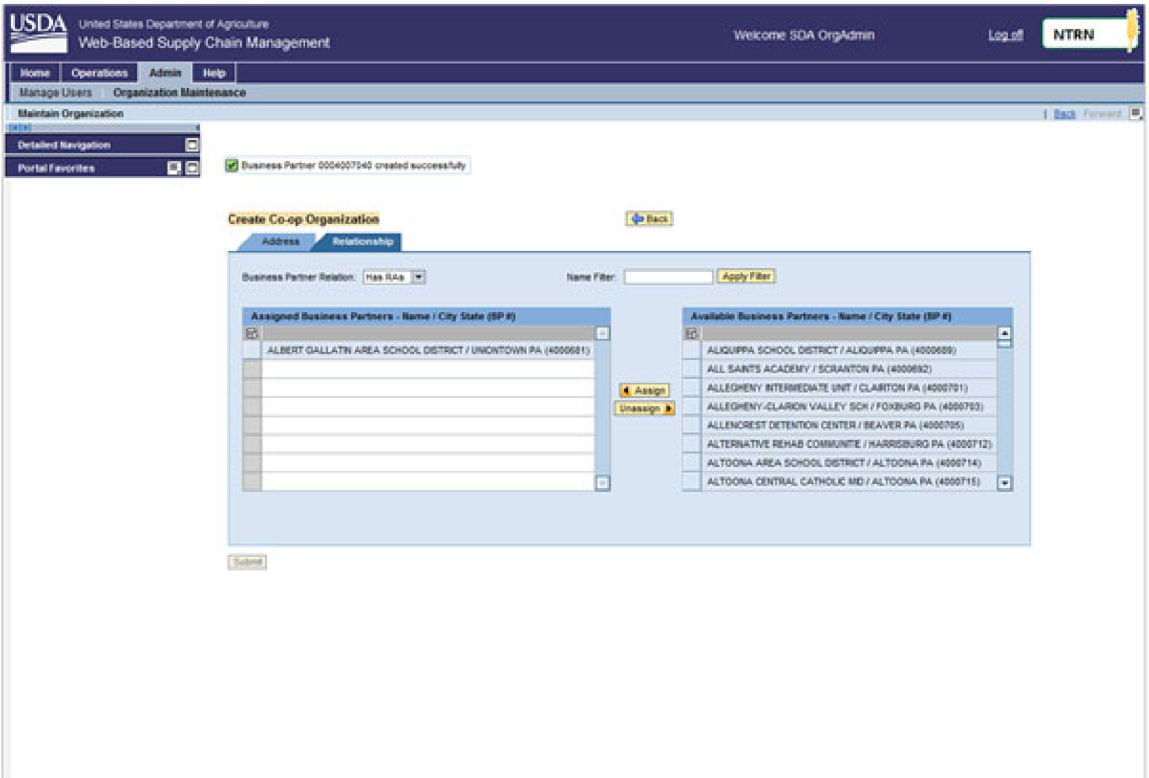
10. Click Assign (the **Assign** button) to assign the selected RA to the new Co-op Organization.

Create Co-op Organization Screen



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.

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.

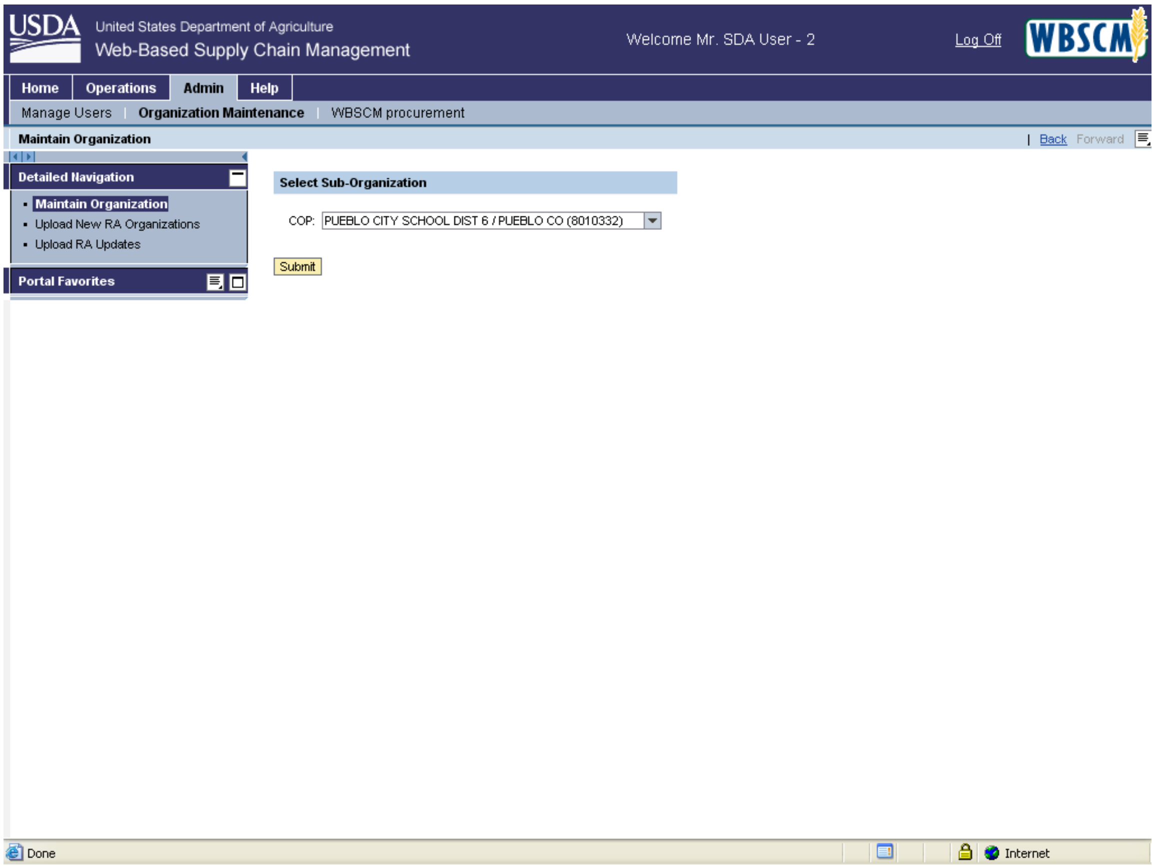
Reminders

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

PROCEDURE

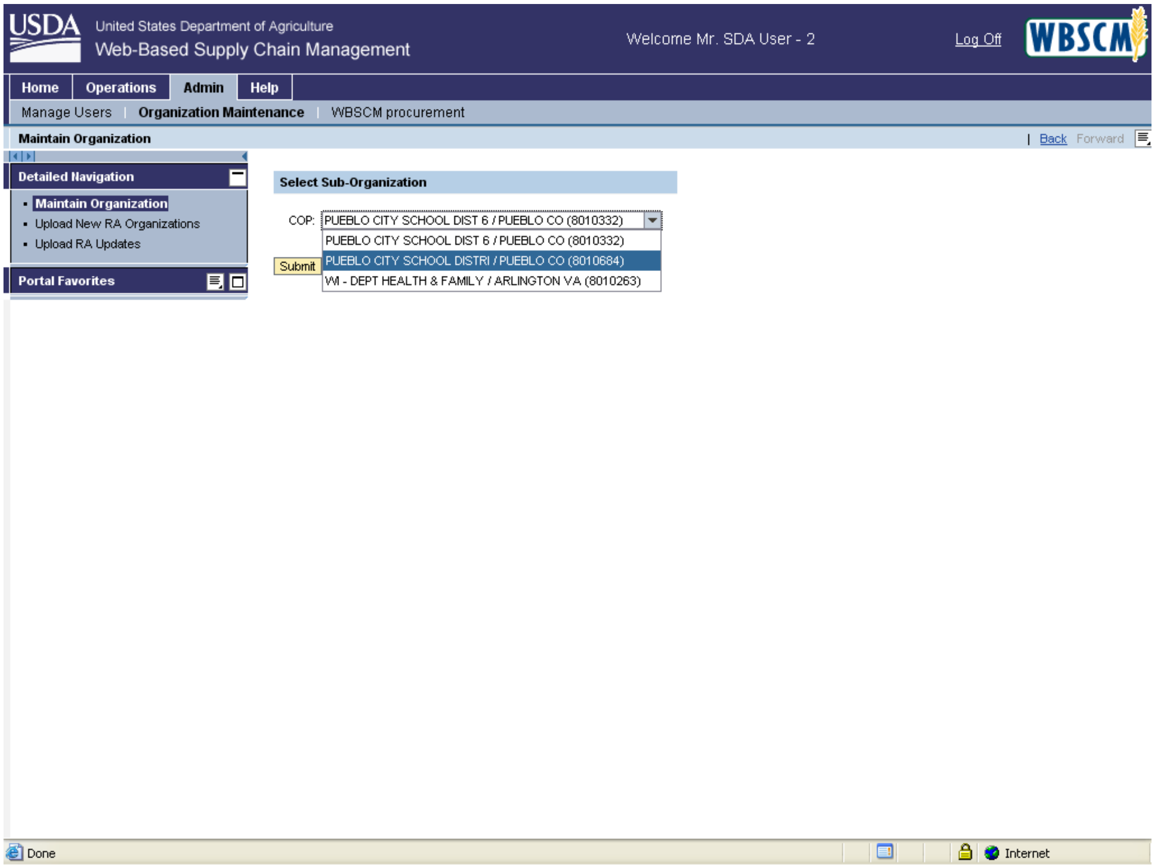
1. Start the transaction using the following Portal path: **Admin** tab ➔ **Organization Maintenance** tab ➔ **Maintain Organization** ➔ **Update Co-op Organization**

Update Co-op Organization Screen



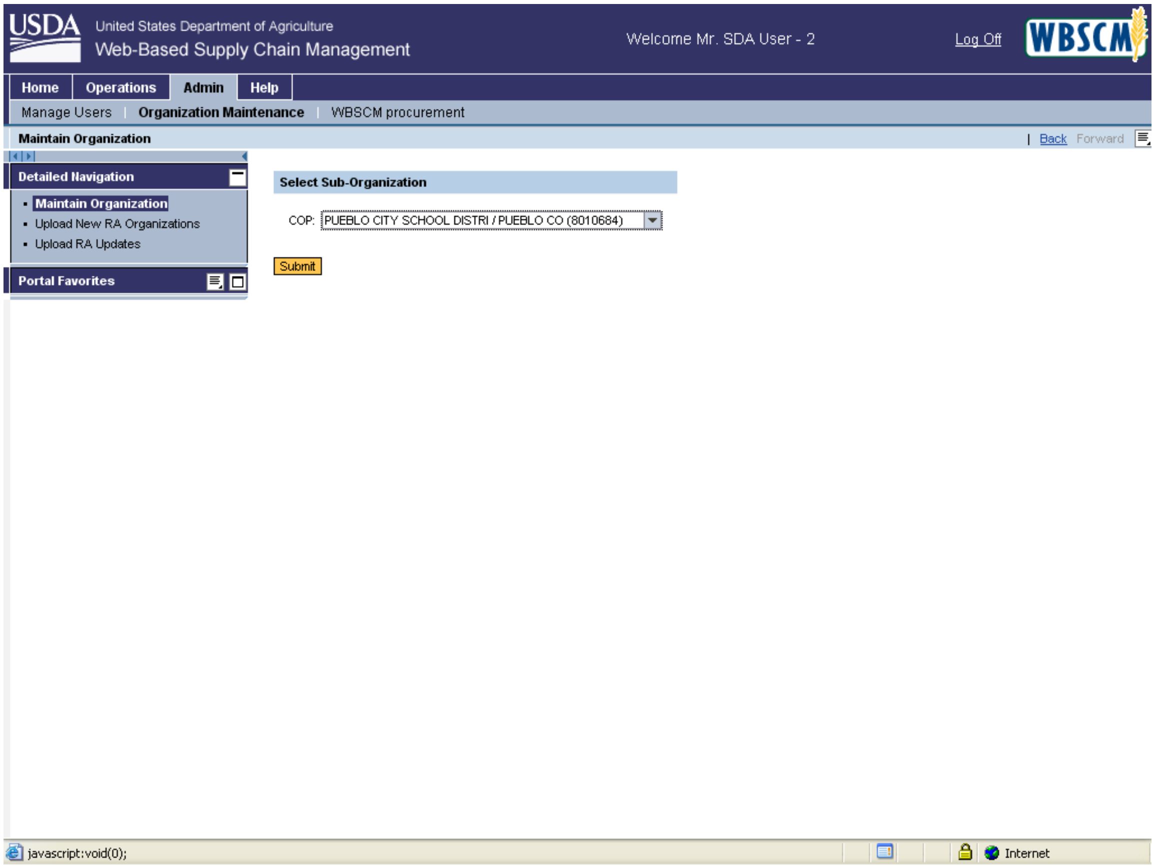
2. In the **COP** field, click on the **Dropdown** button to select the Co-op Organization you wish to modify.

Update Co-op Organization Screen



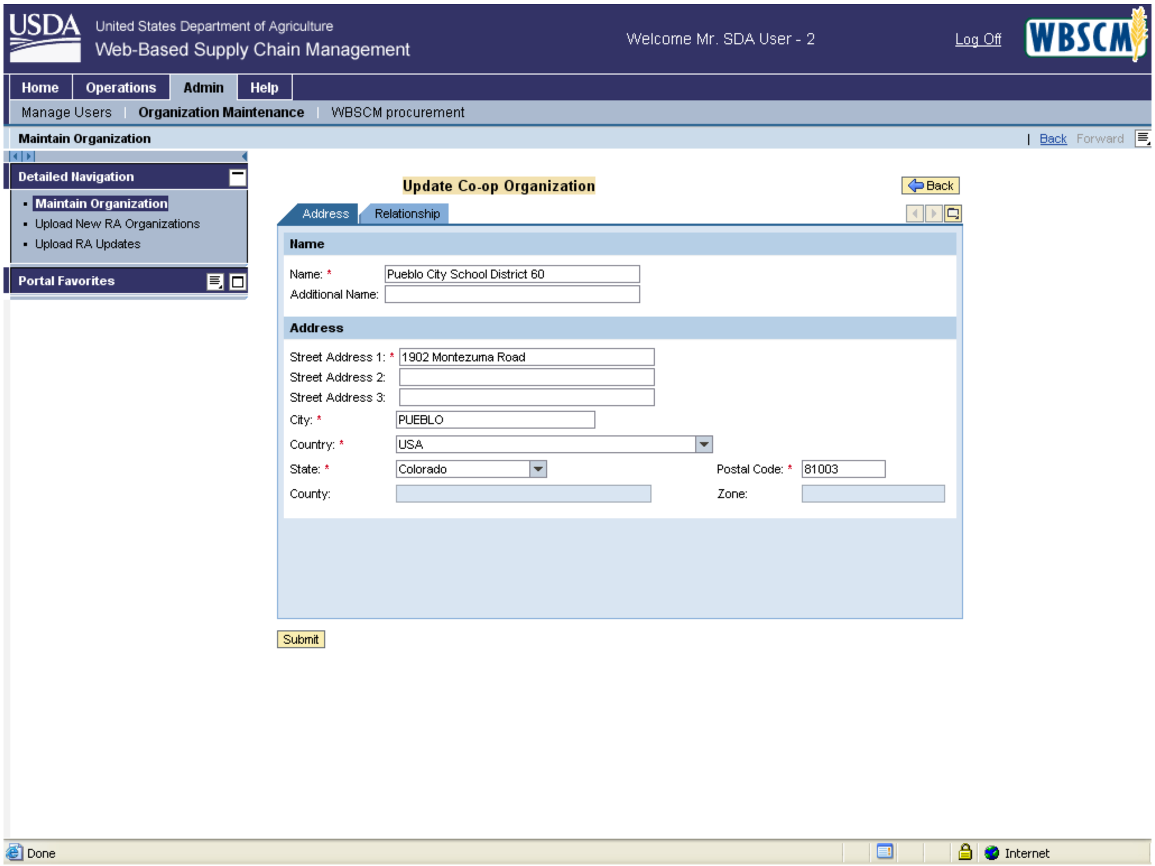
3. From the Dropdown list, select PUEBLO CITY SCHOOL DISTRI / PUEBLO CO (8010684) (the **Pueblo City School District Co-op Organization** option).

Update Co-op Organization Screen



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

Update Co-op Organization Screen

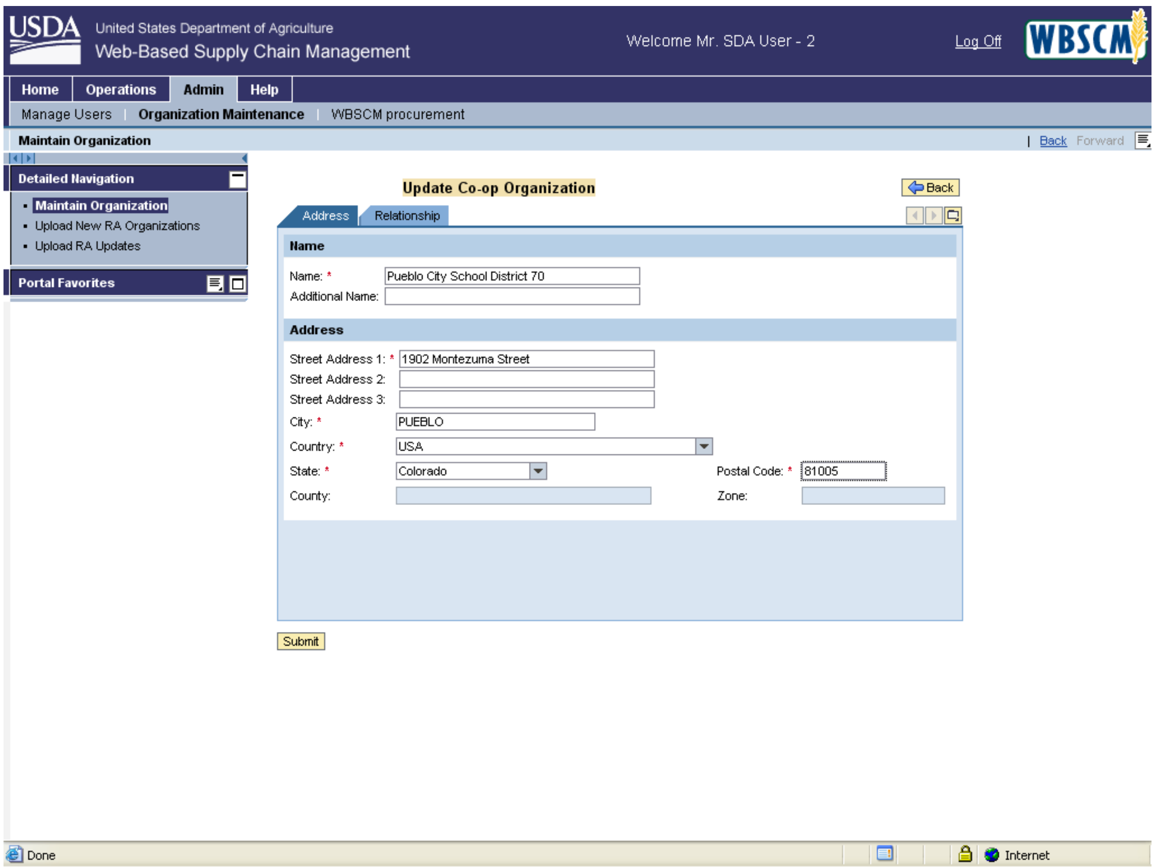


5. As required, complete/review the following fields:

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

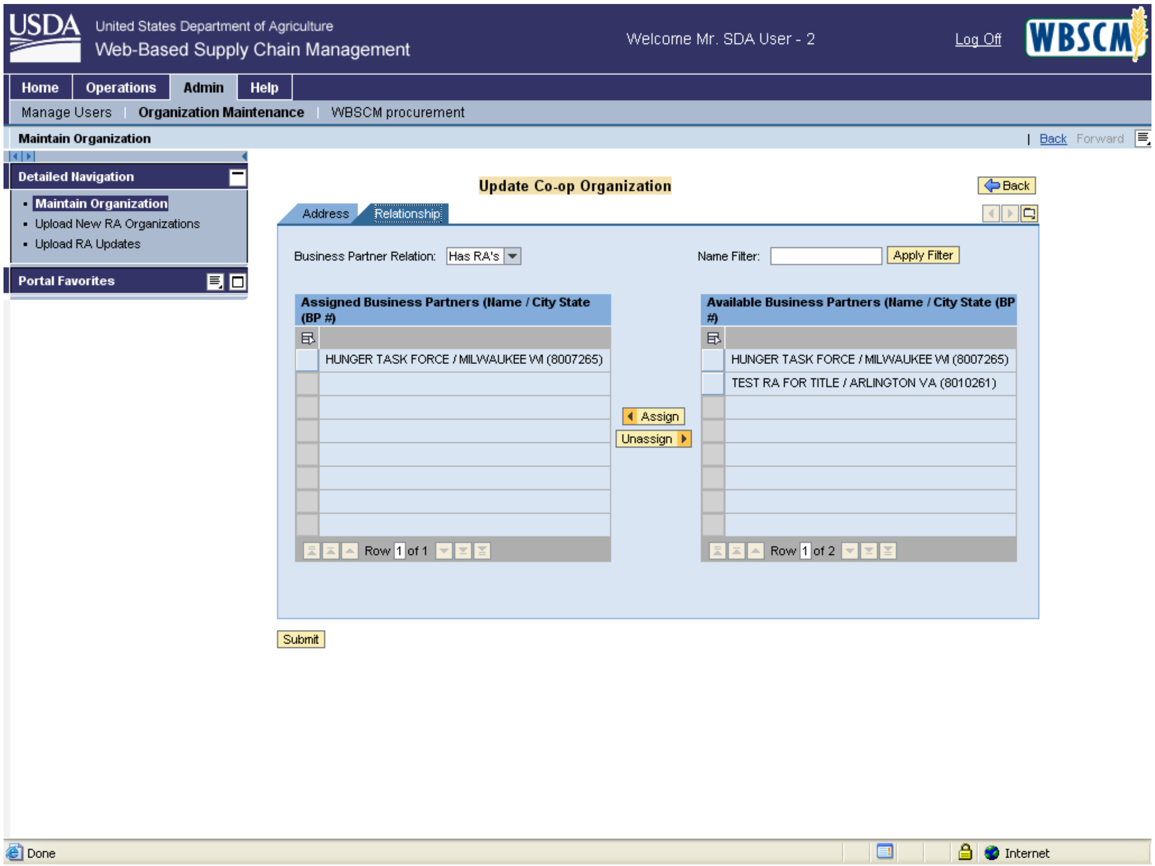
Field	R/O/C	Description
City	R	City where the company is located. **Example:** Pueblo

Update Co-op Organization Screen



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

Update Co-op Organization Screen

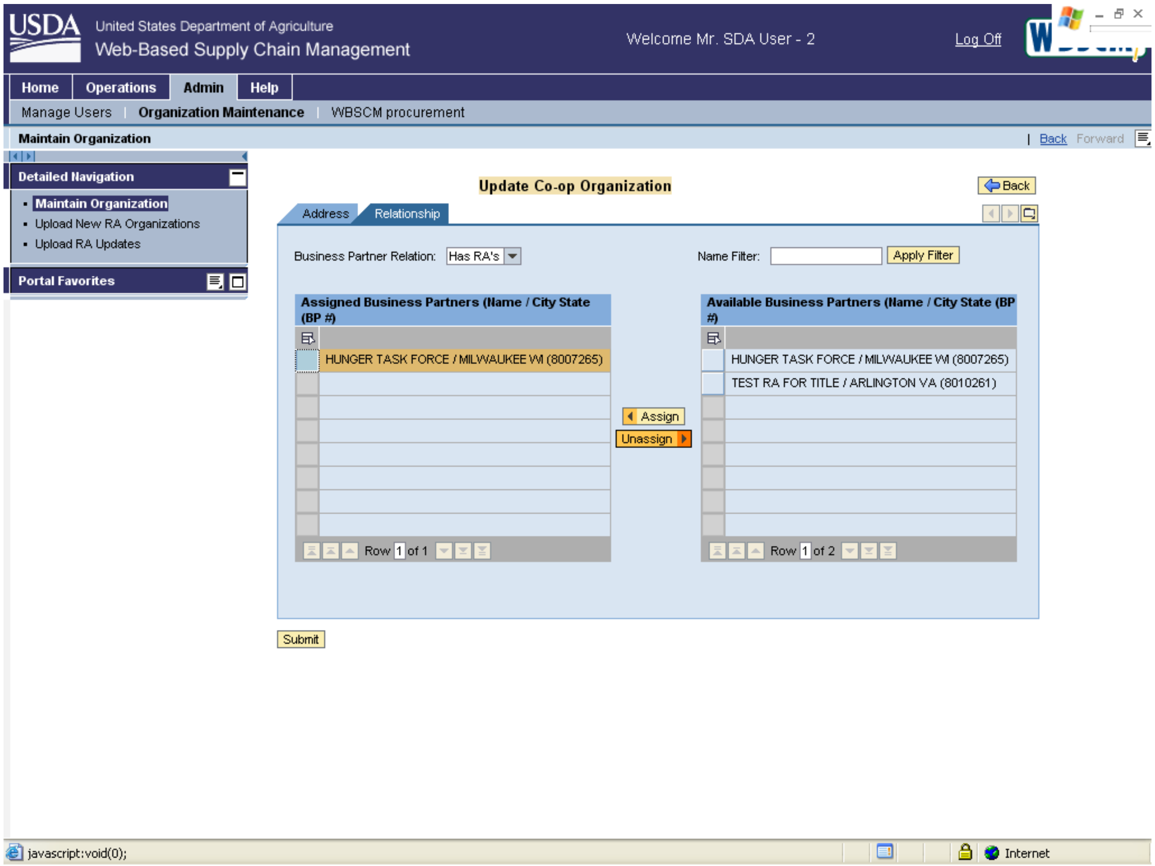


7. Select **Hunger Task Force** under **Assigned Business Partners** to select it for unassignment from the Co-op Organization.

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

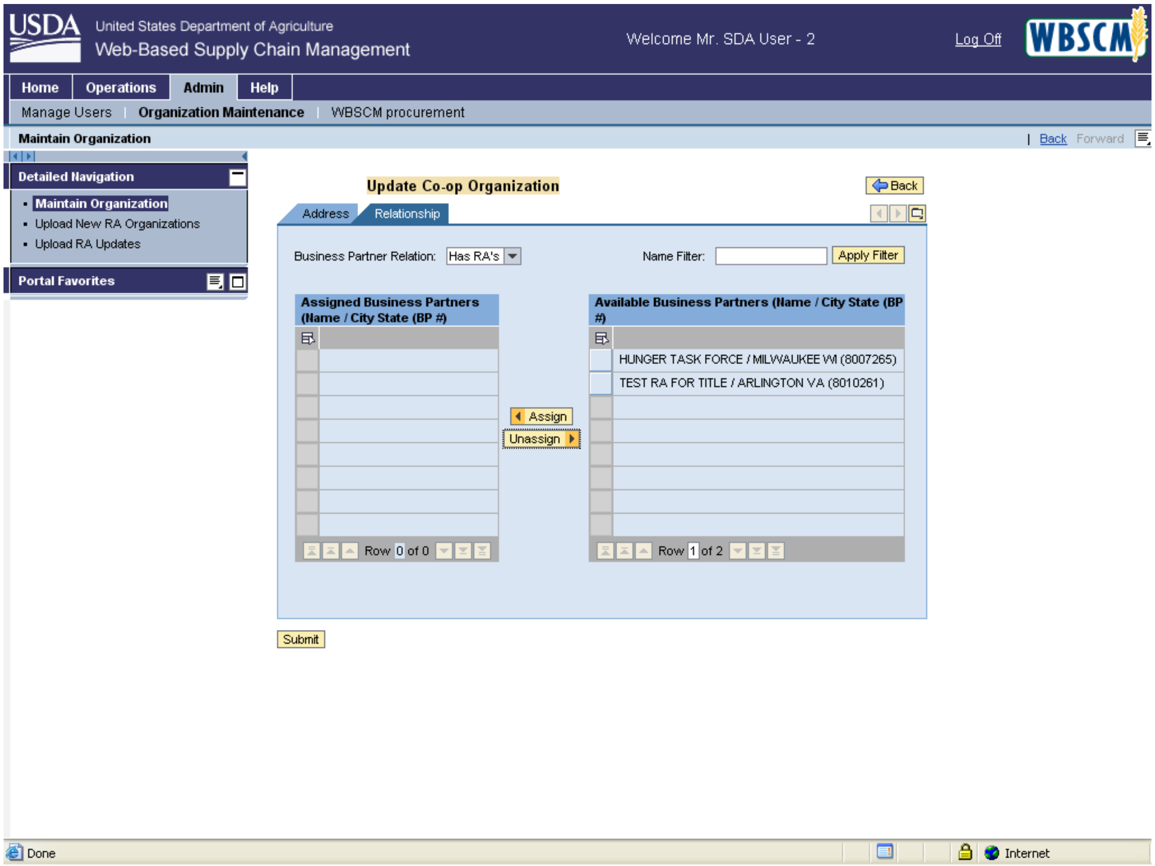
Note, that "Has RAs" is the only Business Partner Relation in the drop down.

Update Co-op Organization Screen



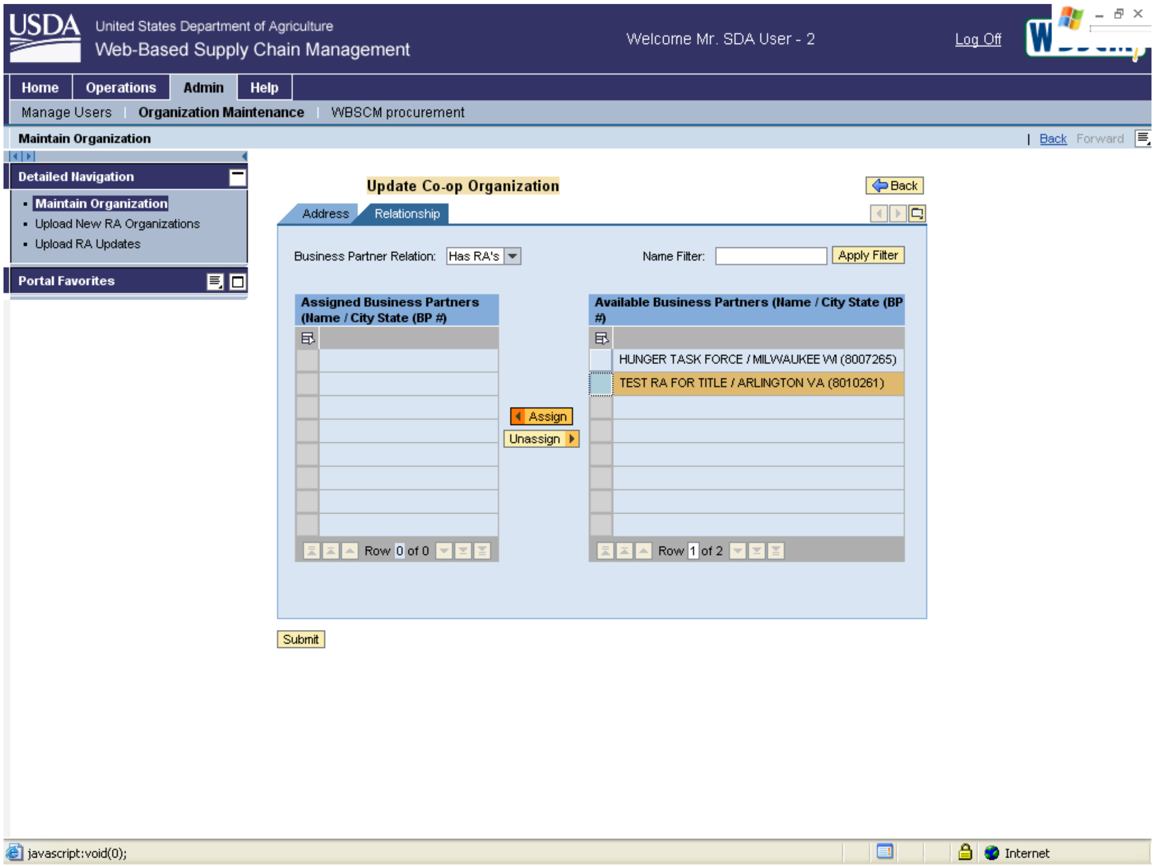
8. Click Unassign (the **Unassign** button) to unassign the selected RA from the Co-op Organization.

Update Co-op Organization Screen



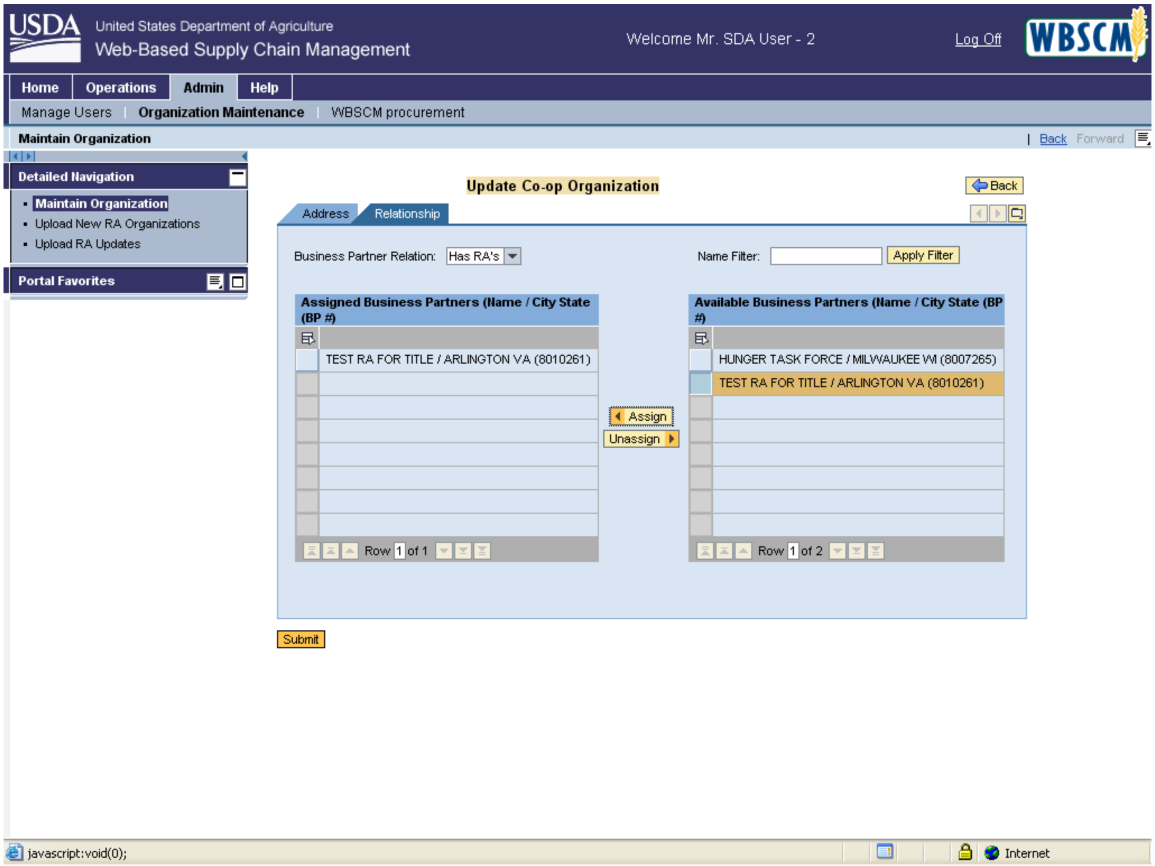
9. Select **Test RA For Title** under **Availabe Business Partners** to select it for assignment to the Co-op Organization.

Update Co-op Organization Screen



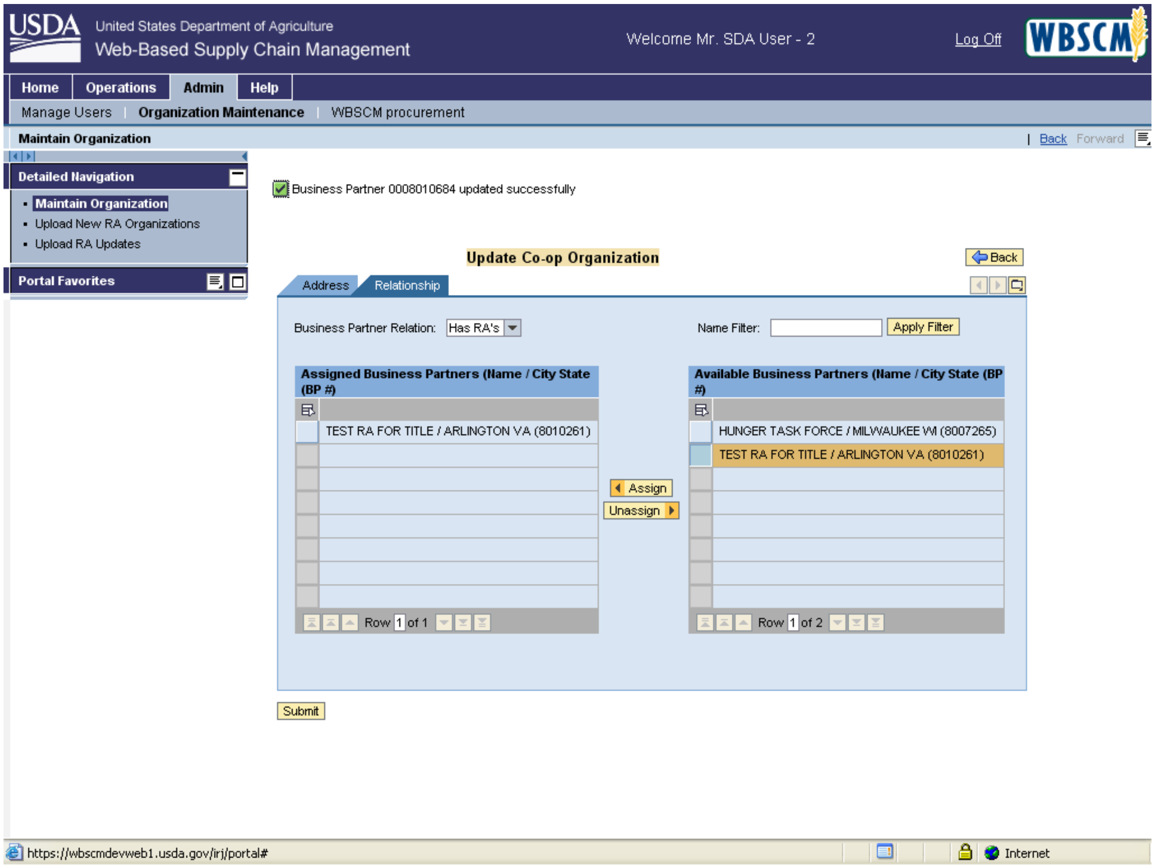
10. Click Assign (the **Assign** button) to assign the selected RA to the Co-op Organization.

Update Co-op Organization Screen



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

Update Co-op Organization Screen



12. You have completed this transaction.

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

RESULT

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