

ACDA Annual National Conference
Web Based Supply Chain Management

May 2009





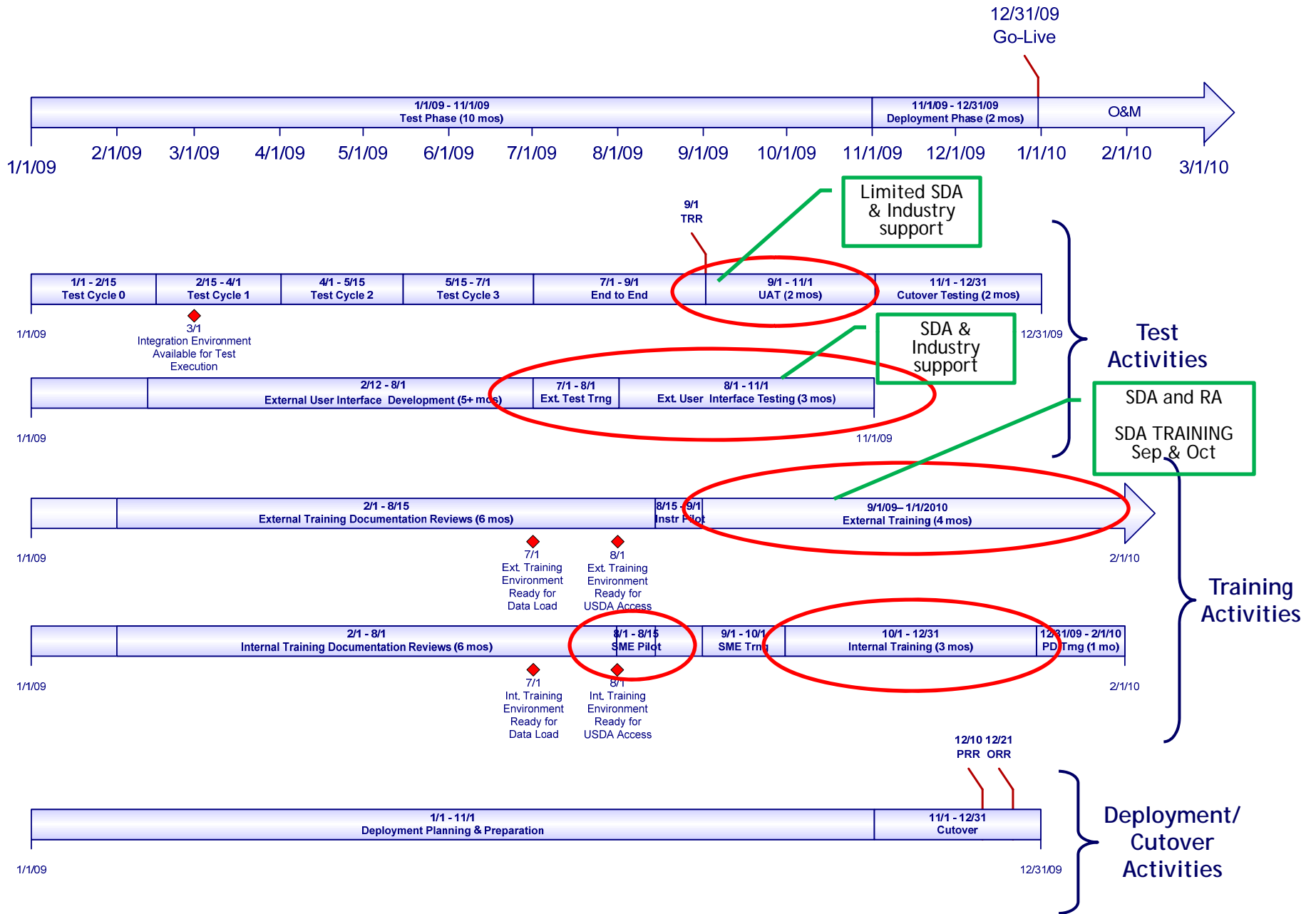
AGENDA

- WBSCM Status
- Deployment Preparation
- WBSCM Demonstrations
- WBSCM Processes
- Questions & Answers / Discussion Panel

- Production go-live date established
 - December 31, 2009
- Parallel supporting activities for go-live
 - Development, Data Conversion, Testing, Training, Deployment preparation
- Developing detailed deployment/cutover plans
- Project intensity and activity increases - Staff readiness
 - Communication
 - Internal & External WBSCM User Training
 - Data Conversion, Testing
 - Organizational Change Management (OCM)
 - Procedure changes, tool orientation



WBSCM Project Test, Training, & Deployment Timeline



- Project Communication
 - Conferences
 - Newsletters
 - Regional meetings with stakeholders
 - Formal and informal format
 - WBSCM capability demonstrations
 - uPerform tutorial (eLearning)
 - Auto play or Self Guided
 - Email distribution and Website postings
- SAE Fund re-allocation
 - Reviews complete
 - Regional notification letters being created

- Website Posting - ECOS
 - <https://ecos.usda.gov/>
 - ECOS Training link bottom of page

[For Your Reference](#) | [ECOS Training](#) | [Site Map](#) | [Links](#) | [Home](#) | [Contact Us](#)

- Training link in Header (Top, Right of Page)

Training	Site Map	Links	Home
Product Catalog		Reports	



- Website Posting - ECOS
 - WBSCM information link at bottom of page

Training

[Multi-Food Training](#): A Web-based training program that covers functions related to multi-food

WBSCM

[WBSCM Program Information and Training](#) : Central location for documentation related to WBSCM Program

- New Web page with content links

WBSCM Program Information

Newsletters: Monthly communications of information from FNS on WBSCM

General Information: General documents/presentations on WBSCM

Data Information: WBSCM Data Elements, data crosswalks information

Training: WBSCM training documents

Simulations: Walkthroughs of specific functionality



- Website Posting - FDD
 - FDD Web Site
(<http://www.fns.usda.gov/fdd/WBSCM/default.htm>)
 - Content categories with links



- Website Posting - FDD



FNS-WBSCM Information

Following are links to guidance materials and updates regarding the Web Based Supply Chain Management (WBSCM) System.

Newsletters

- [March 2009 FNS-WBSCM Newsletter](#)
- [January 2009 FNS-WBSCM Newsletter](#)

General Information

- [Glossary](#) - defines WBSCM (SAP) term versus PCIMS/ECOS terminology.
- [Brochure](#) - Tri-fold brochure describing WBSCM and how it affects you.

Data Information - Files

- [Click to access WBSCM data files page.](#)

WBSCM Project Timeline

- [2009-2010 Testing and Training Timeline](#)

Powerpoints

- [Southwest Regional Conference, April 16, 2009](#)
- [E-Learning Courses](#)



- WBSCM cutover and ECOS shutdown
 - No parallel operations
 - Identify, manage and mitigate risks
 - Unique program/system management capabilities
- State, Recipient Agency and Industry participation
 - System interfaces
 - Testing
 - Training
 - Data conversion
 - Deployment Preparation
 - Business Operations



Deployment Preparation - System Interfaces

- System interfaces - Formal 2-way process
 - System supported upload/download
 - Orders, Recipient Agency organizations, RA entitlement
 - Modify XML file formats and data structures
 - New tags, data items and characteristics
 - Commodity code ==> Item Number
 - 4 alphanumeric ==> 10 numeric
 - Change in upload process
 - Assignment of WBSCM order & organization numbers
 - System provided cross reference at upload
 - Data definitions available on ECOS, FDD website

- System interfaces - Informal (data sharing) 1-way process
 - Data extracts from ECOS reports
 - Surveys (catalog), commodity file (Item Master), orders
 - Files processed for organization systems
 - Loaded into spreadsheets
 - Organization controlled & managed
 - Affected by changes in data characteristics
 - Load = DO number ==> Sales Order & Line Item number
 - Computer system program & data changes
 - Analysis and process changes in spreadsheet
 - Data Definitions to be posted on Web sites
 - Base Information - XML file format spreadsheets



- Testing phases
 - Integration testing - USDA staff
 - Scheduled 5-15-09 to 9-1-09
 - Formal Interface testing - Affected Organizations with USDA support
 - Scheduled 8-1-09 to 11/1/09
 - Duration varies by organization
 - Confirm ability to send, receive, process WBSCM data
 - Informal interface tests - system data feeds
 - View only user (reports)
 - Identify State Agency

- User Acceptance Testing
 - Scheduled 9-1-09 to 11-1-09
 - USDA/USAID, State & Recipient Agencies & Industry
 - Representative group of non-Federal participants
 - Large, medium, small SDAs
 - ECOS available to RAs
 - Structured testing
 - Test scripts, defect reporting, retesting
 - Time and resource commitment



- Training curriculum, content & schedule being finalized
 - State Agency training
 - Instructor Led (ILT), eLearning, hands on training scenarios
 - Content based on user role
 - Pre-requisite Basic Navigation eLearning course
 - Instructor led courses for SDA conducted at Region
 - 2 FDD National Office staff; 1 Regional staff per class
 - Up to 2 SDA attendees per class (limit 20 students)
 - Locations TBD



- Training Schedule - Session 1 - NSLP Agencies
 - September 2009
 - Week 1 (9/7 - Holiday 9/7): NERO, MARO
 - NERO NSLP & Household Programs training.
 - Week 2 (9/14): MWRO, MARO
 - Week 3 (9/21): SERO
 - Week 4 (9/28): WRO, SWRO



- Training Schedule - Session 2 - Household Programs Agencies
- October 2009
 - Week 1 (10/5): MPRO
 - Training for MPRO NSLP & Household Program States
 - Week 2 (10/12 - Holiday 10/12): SERO, MWRO
 - Week 3 (10/19): SWRO, MARO
 - Week 4 (10/26): WRO



- Recipient Agency training
 - State scheduled and led
 - Instructor led, eLearning, hands on training scenarios
 - Internet connection required for hands on training
 - No specialized software - Web Browser based
 - Internet Explorer version 6.0 or higher
 - Pre-requisite Basic Navigation eLearning course
 - Electronic versions of training materials provided by USDA
 - Work Instructions
 - Cue cards
 - eLearning materials



- eLearning Solution
 - eLearning for less complex processes & general topics
 - Basic Navigation Training
 - Refresher training / New User training
 - Support documentation for ILT
 - Posted to FNS/ECOS Web Sites when available



e-Learning Course Structure

- Learning Objectives listed by lesson
 - Concepts describe training content
 - Include Audio
- Simulations are animated demonstrations of transactions allowing step-by-step practice
 - Auto Playback Tutorial
 - Standard Tutorial
- Self-assessments provide opportunity to check knowledge

Learning objectives are listed and explained

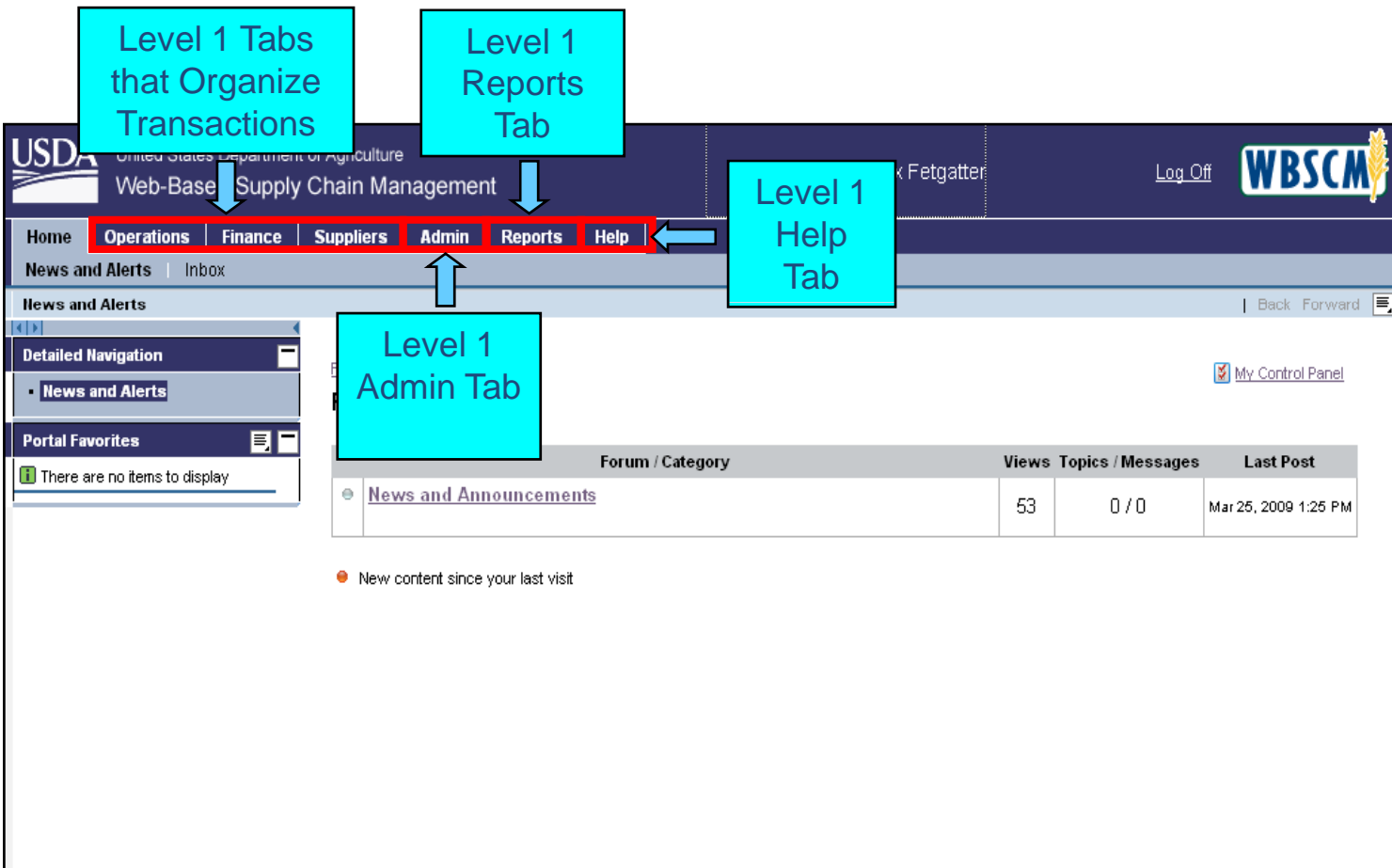


Lesson Objectives

Identify the elements of a Portal screen

Navigate to a transaction

Training concepts are introduced using audio ...



The screenshot shows the WBSCM web application interface. The navigation menu at the top includes Home, Operations, Finance, Suppliers, Admin, Reports, and Help. The 'Admin' tab is highlighted with a red box and labeled 'Level 1 Admin Tab'. The 'Reports' tab is labeled 'Level 1 Reports Tab'. The 'Help' tab is labeled 'Level 1 Help Tab'. The 'Operations' tab is labeled 'Level 1 Tabs that Organize Transactions'. The 'Admin' tab is also labeled 'Level 1 Admin Tab'. The interface includes a 'News and Alerts' section, a 'Detailed Navigation' sidebar, and a 'Portal Favorites' section. A table displays forum information with columns for 'Forum / Category', 'Views', 'Topics / Messages', and 'Last Post'. The table contains one row for 'News and Announcements' with 53 views and 0 topics/messages, last posted on Mar 25, 2009 at 1:25 PM. A 'My Control Panel' link is visible in the top right corner.

Forum / Category	Views	Topics / Messages	Last Post
News and Announcements	53	0 / 0	Mar 25, 2009 1:25 PM

● New content since your last visit

... and explained further

The screenshot displays the WBCSCM interface for the 'Create Material' function. The top navigation bar includes 'Home', 'Operations', 'Finance', 'Suppliers', 'Admin', 'Reports', 'Help', 'sandbox all', and 'CRM'. Below this, a secondary navigation bar lists 'Order Processing', 'Procurement', 'Complaint Administration', 'Recall Administration', 'Warehouse Management', 'Supplier Mgt', and 'Master Data'. The 'Create Material' page features a 'Detailed Navigation' panel on the left with an expandable 'Material' folder containing options like 'Maintain Material Substitutables', 'Create Material', 'Change Material', 'Display Material', 'Mark Material for Deletion', and 'Process Product'. The main content area, titled 'Create Material (Initial Screen)', contains a 'Menu' bar with 'Back', 'Exit', 'Cancel', 'System', 'Select view(s)', 'Organizational levels', and 'Data'. Below the menu are input fields for 'Material', 'Industry sector', 'Material Type', and 'Change Number', along with a 'Copy from...' section. A 'Back' and 'Forward' link is located in the top right corner of the content area. Several callout boxes provide instructions: 'Click this Arrow Icon to Collapse the Detailed Navigation Panel' points to a small arrow icon; 'Level 2 Tabs Within the Level 1 Operations Tab' points to the 'Master Data' tab; 'Expandable Folders Within the Detailed Navigation Panel' points to the 'Material' folder; 'The Create Material Initial Screen Within the Content Area' points to the main content area; and '"Back" and "Forward" links' points to the respective buttons.

Click this Arrow Icon to Collapse the Detailed Navigation Panel

Level 2 Tabs Within the Level 1 Operations Tab

Expandable Folders Within the Detailed Navigation Panel

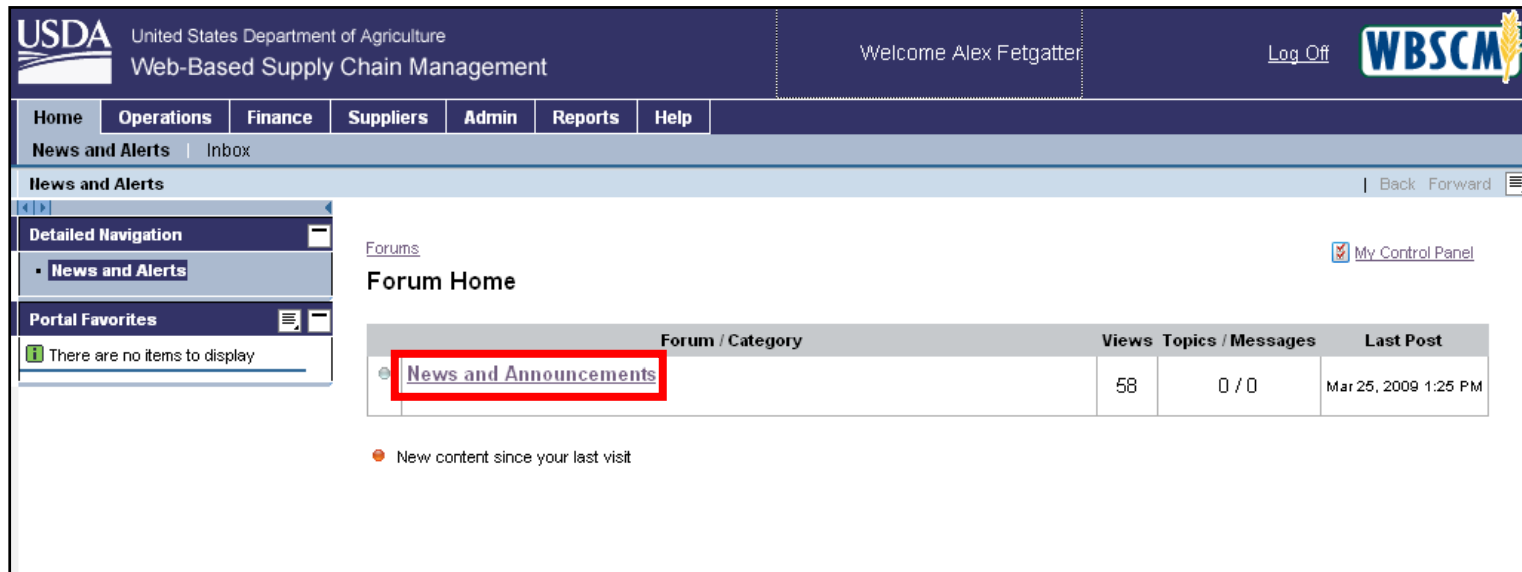
The Create Material Initial Screen Within the Content Area

"Back" and "Forward" links


eLearning tutorials are animated demonstrations of transactions:

Auto Playback Tutorial: watch the simulation with no user input required

Standard Tutorial: guide yourself through the simulation by clicking on certain areas when prompted for step-by-step practice



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

Welcome Alex Fetgatter [Log Off](#) 

Home Operations Finance Suppliers Admin Reports Help

News and Alerts | Inbox

News and Alerts | Back Forward

Detailed Navigation

- News and Alerts


Portal Favorites

There are no items to display

Forums [My Control Panel](#)

Forum Home

Forum / Category	Views	Topics / Messages	Last Post
News and Announcements	58	0 / 0	Mar 25, 2009 1:25 PM

 New content since your last visit

Step 6: Click on the News and Announcements forum link to display message threads.

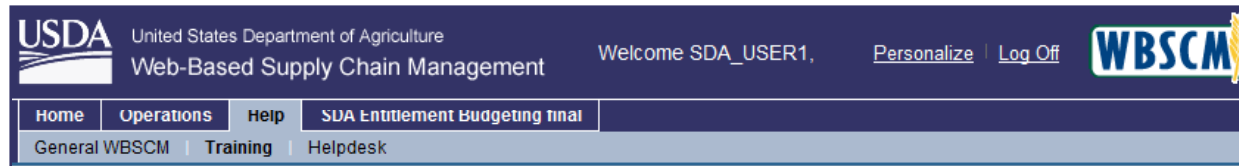
Self-assessments list questions for end-users to answer and provide feedback

1. True or False: Level 2 tabs are the same regardless of which Level 1 tab is selected.
 - A. True
 - B. False**
2. A list of the transactions available within a particular Level 2 tab can be found in the _____. These transactions are often organized into expandable folders.
 - A. Content Area
 - B. Portal Masthead
 - C. Detailed Navigation Panel**
 - D. Transaction Initial Screen
3. Which of the following Level 1 tabs allows you to change such personal information as first and last name, physical address, telephone numbers, and contact e-mail address?
 - A. Admin**
 - B. Help
 - C. Reports
 - D. Home



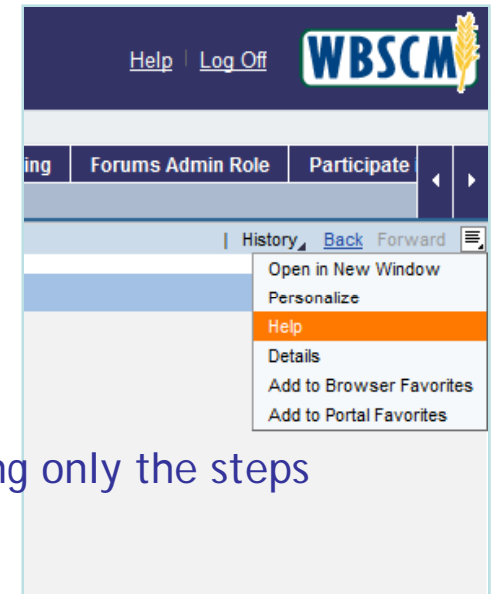
Online Support

All WBSCM end-users will have access to support and help documentation in various formats.



Online context sensitive help in the several formats will be available. This type of help is available when a WBSCM end-user is in the portal and requires help for a particular transaction:

- **Work Instructions:** Procedural documents with screenshots, instructions and field definitions (available in MS Word, HTML, and PDF formats)
- **Cue Cards:** Condensed version of the Work Instruction, showing only the steps required for the transaction (available in HTML format)
- **Quick Reference Steps:** Condensed version of the Work Instruction, showing only the steps required for the transaction (available in MS Word and PDF formats)
- **Simulations:** Animated demonstrations of transactions





- Work Instructions

Procedure

1. Start the transaction using the following Portal path: **Operations** tab → **Order Processing** tab → **Order Management** folder → **Maintain Sales Documents**

Search: Sales Orders

The screenshot displays the USDA Web-Based Supply Chain Management portal. The top navigation bar includes tabs for Operations, Finance, Suppliers, Reports, sandbox all, and CRM. Below this, a secondary navigation bar lists various functions: Order Processing, Procurement, Complaint Administration, Recall Administration, Warehouse Management, Supplier Mgt, and Master Data. The main content area is titled 'Maintain Sales Documents' and features a 'Search: Sales Orders' section. This section includes a search criteria form with fields for Sales Order ID, Sold-To Party Name, External Reference, and Employee Responsible Last Name, each with a dropdown menu and radio button. A 'Maximum Number of Results' field is set to 100. Below the search criteria are buttons for 'Search', 'Clear', and 'Save Search As'. The 'Result List' section shows a table with columns for Sales Order ID, Sold-To Party, Net Value, Crpy, Status, Posting Date, and External Reference. The table is currently empty, with a 'New' button and a 'Go' button visible above it.

- Work Instructions

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

Field	R/O/C	Description
Sales Order ID	R	Field that specifies the sales order number that a user will be searching for. Example: 1000001163



If you do not have the full Sales Order ID, you can enter a partial number along with an asterisk (*). If you place the asterisks in the front of your partial number (ex. *1163), the system will search for all sales order numbers that end with 1163. If you place the asterisks at the end of your partial number (ex. 1163*), the system will search for all sales order numbers that start with 1163. If you place an asterisks at BOTH ends of your partial number (ex. *1163*), the system will search for all sales order numbers that start and end with 1163.

If you do not know the Sales Order ID, you can also search by the Sold-To Party Name, External Reference Number, or the last name of the employee responsible for handling the order. As with the Sales Order ID field, you may enter a partial name or partial number into any of these fields, if needed.

- Cue Cards

Procedure

1. Start the transaction using the following Portal path: **Operations** tab → **Order Processing** tab → **Order Management** folder → **Maintain Sales Documents**



Search: Sales Orders

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

- Sales Order ID



If you do not have the full Sales Order ID, you can enter a partial number along with an asterisk (*). If you place the asterisks in the front of your partial number (ex. *1163), the system will search for all sales order numbers that end with 1163. If you place the asterisks at the end of your partial number (ex. 1163*), the system will search for all sales order numbers that start with 1163. If you place asterisks at BOTH ends of your partial number (ex. *1163*), the system will search for all sales order numbers that contain 1163 anywhere in the number.

If you do not know the Sales Order ID, you can also search by the Sold-To Party Name, External Reference Number, or the last name of the employee responsible for handling the order. As with the Sales Order ID field, you may enter a partial name or partial number into any of these fields, if needed.

As with most searches in WBSCM, you can determine the maximum number of results you wish to display.



Search: Sales Orders

3. Click to process your entry.



Deployment Preparation - Data Conversion

- Data conversion
 - Data converted & migrated to WBSCM
 - Cleanse, reformat, load, validate
 - Data links - SAP documents Sales Orders / Purchase Orders
 - Interface Control Documents
 - Data Definitions
 - Cross walks / Data Translation Tables
 - Item Numbers (Commodity Code)
 - Ship To locations (Entity Code)
 - Sales Order-Line Item numbers (Delivery Order Number)



Deployment Preparation - Data Conversion

A	B	C	D	E	F
Item	Description	Go Live	- 30	-60	- 90
Catalog	At Go-Live, FNS will create the catalogs for immediate use by SDA / RA	X			
Entitlements	Entitlement conversion/load	X			
Material conversion (Commodity Code	Need to associate the existing 4 digit commodity code to the new material number.			X	
Material File Extract	Need to provide new materials along with their data elements (like the commodity file).			X	
Orders	Need to have an association of the current PCIMS orders to the converted Sales Order / Line Items.	X			
Programs	A listing of the program codes and description that WBSCM will be using.				X
Purchase Reqs / Purchase Orders	Purchase Order / Line Items associated with Sales Orders	X			
Recipient Agency IDs	Associate the converted Recipient Agency to the WBSCM ID generated			X	
Sales Order status Descriptions	A listing of the WBSCM Sales Order status descriptions that will be used in WBSCM.				X



Deployment Preparation - Data Conversion

A	B	C	D	E	F
Item	Description	Go Live	- 30	-60	- 90
Ship to locations	Need to associate the existing PCIMS category 4 entity codes to the WBSCM business partners created/consolidated. These data elements will also have impact to converted: Sales Orders, NDs, contracts.			X	
State Customer ID	A cross reference of the current 3 digit numeric SDA codes to the new Customer Identifiers that will be created in WBSCM.			X	



Deployment Preparation - Data Conversion

- WBSCM team provides cross reference data as available
 - Post on Web Sites
 - Early delivery item updates at go-live



- Deployment Preparation - System
 - Organization System and Interface changes
 - Data conversion
 - Clean up ECOS data (organization, user IDs, profiles)
 - Valid current user email addresses
 - Security changes
 - USDA eAuthentication Level-1 User IDs for Customer & Vendor Logon
 - Registration process in WBSCM during User conversion/creation
 - One eAuth ID per person for each organization assigned
 - Current eAuthentication Level-2 IDs OK



- Deployment Preparation - System
 - Schedule & Attend training sessions
 - ECOS shutdown
 - Date TBD - (earliest 12/15/2009)
 - Business operations determine date
 - PCIMS shutdown date drives transactions
 - USDA/USAID planning
 - Create final required reports
 - Create final archive files in CSV format
 - Identify risk areas - technical, business, data
 - Plans to avoid and manage risks
 - Communicate situation and status to FNS



Deployment Preparation - System & Business Operations

- Deployment Preparation - Business Operations
 - End of calendar year 2009, early 2010 impacts
 - Early quarterly ordering for Jan - Mar 2010 delivery
 - Due NLT Date TBD
 - Contract Award Date TBD
 - Deliveries for December 2009 & January 2010
 - Determine your needs & order accordingly
 - FNS, AMS & FSA discussing delivery period options
 - December 16 - 31 & January 1 - 15
 - Most activity and risk
 - Manual methods as backup



Deployment Preparation - System & Business Operations

- Deployment Preparation - Business Operations
 - Accommodate customer roll-out approach & risk tolerance
 - ECOS Surveys School Year 2010/2011
 - Available for early ordering in ECOS
 - Survey release date TBD - workload dependent
 - Available delivery dates TBD - July '10 to June '11?
 - Order Due NLT around early December 2009
 - All RA requisitions rolled-up
 - Orders loaded into WBSCM during conversion



Deployment Preparation - System & Business Operations

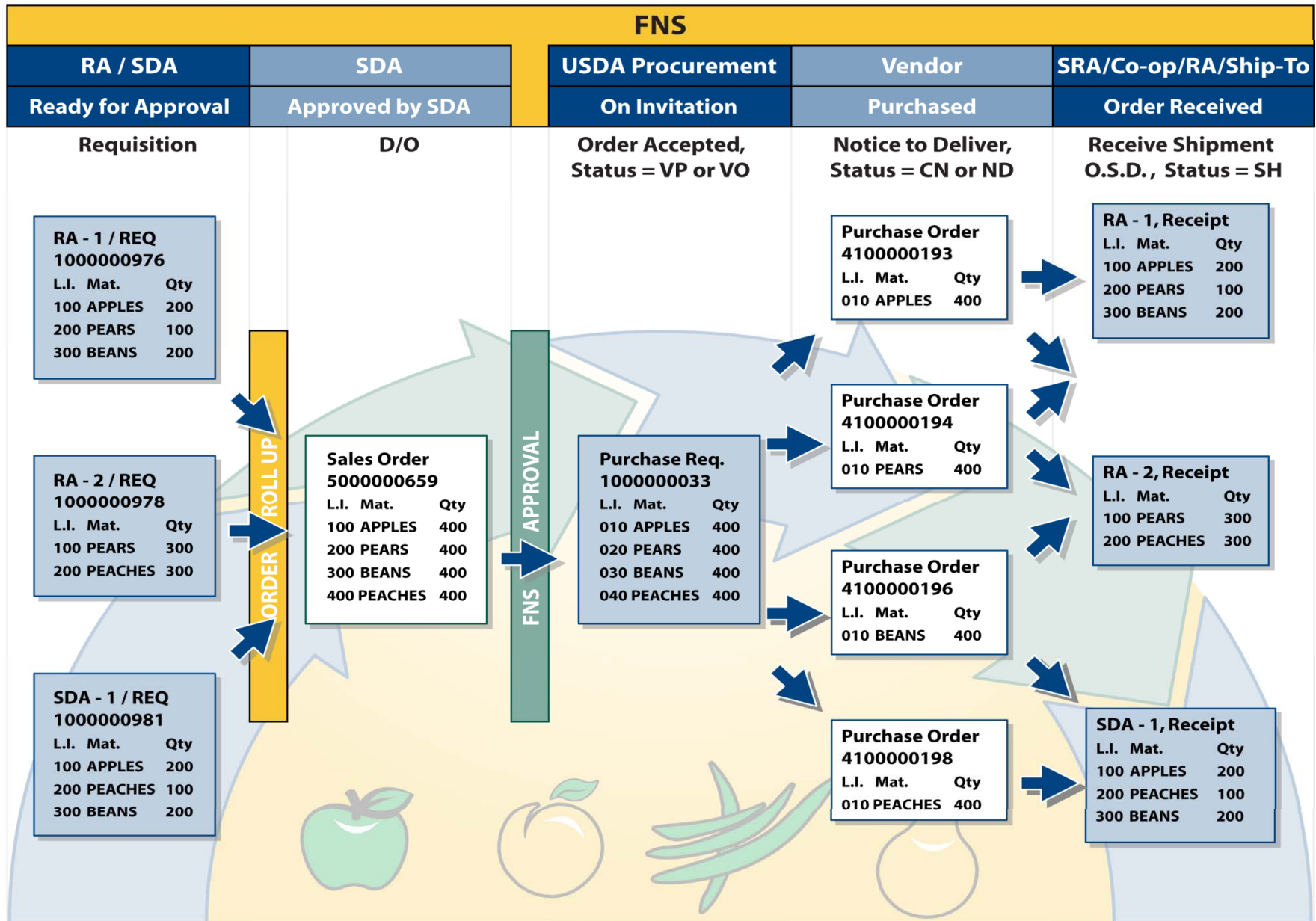
- Deployment Preparation - Business Operations
 - WBSCM Catalog School Year 2010/2011
 - Created at or shortly after go-live
 - Match ECOS survey product and program offers
 - Available delivery dates cover school year
 - Match ECOS survey dates
 - Orders Due NLT dates follow normal schedule



Order Entry, Order Roll Up, Goods Receipt



WBSCM Special Processes - Document Terminology & Flow





WBSCM User ID Creation & Maintenance



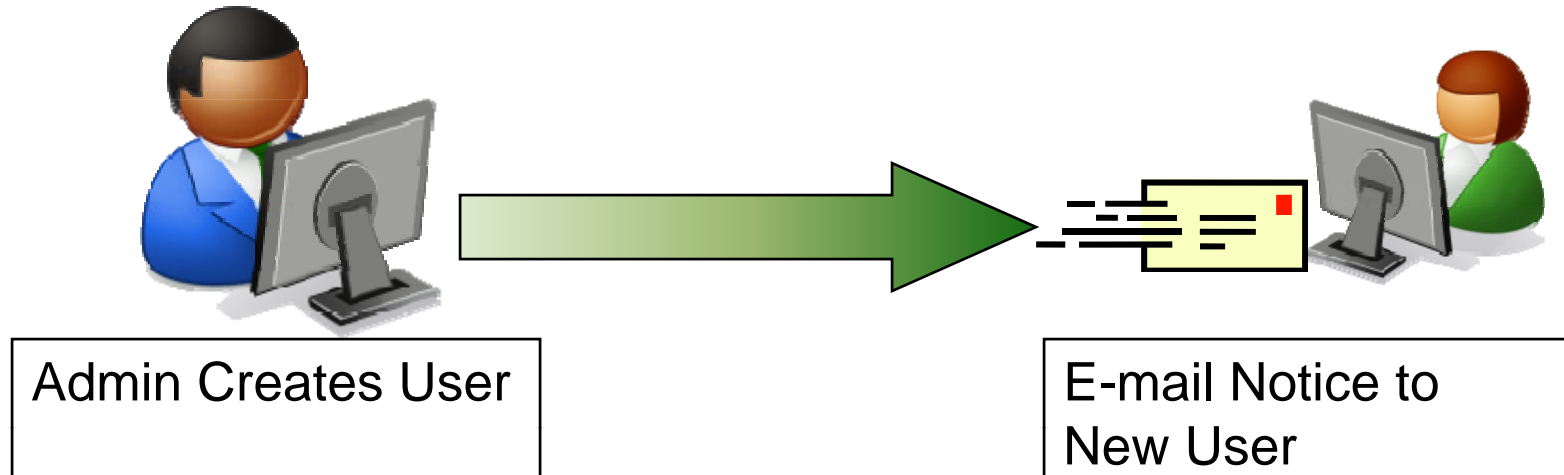
Admin Creates User

Enter User Information

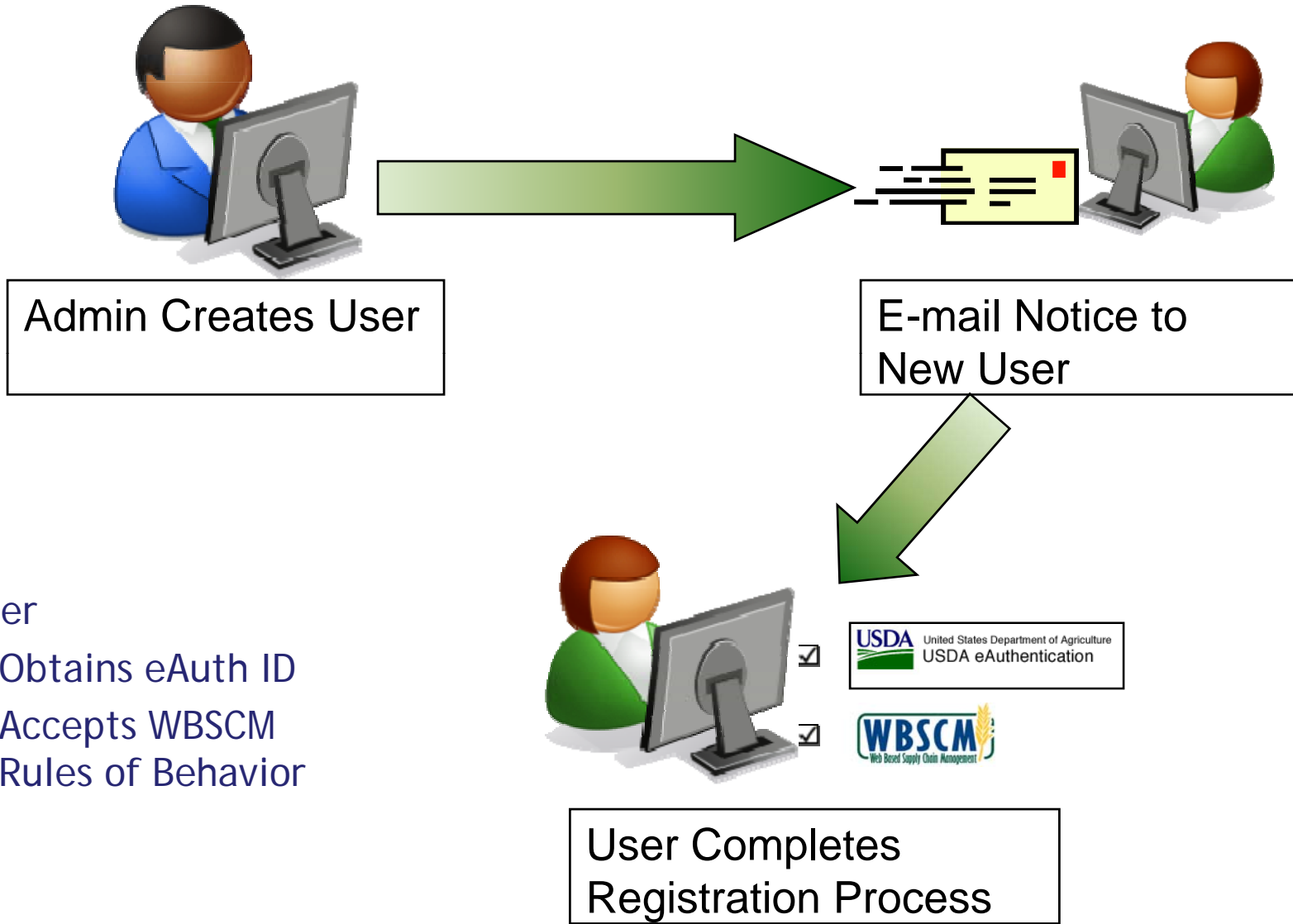
- Select Organization (Downstream and Central User Admins)
- First Name
- Last Name
- Email Address

Enter Optional Information

- Telephone
- Mobile
- Fax



- WBSCM sends invitation to user's email address
- Email contains directions and links to
 - Obtain USDA eAuthentication ID
 - Complete Registration in WBSCM



User

- Obtains eAuth ID
- Accepts WBSCM Rules of Behavior



User Registration Validation Checks

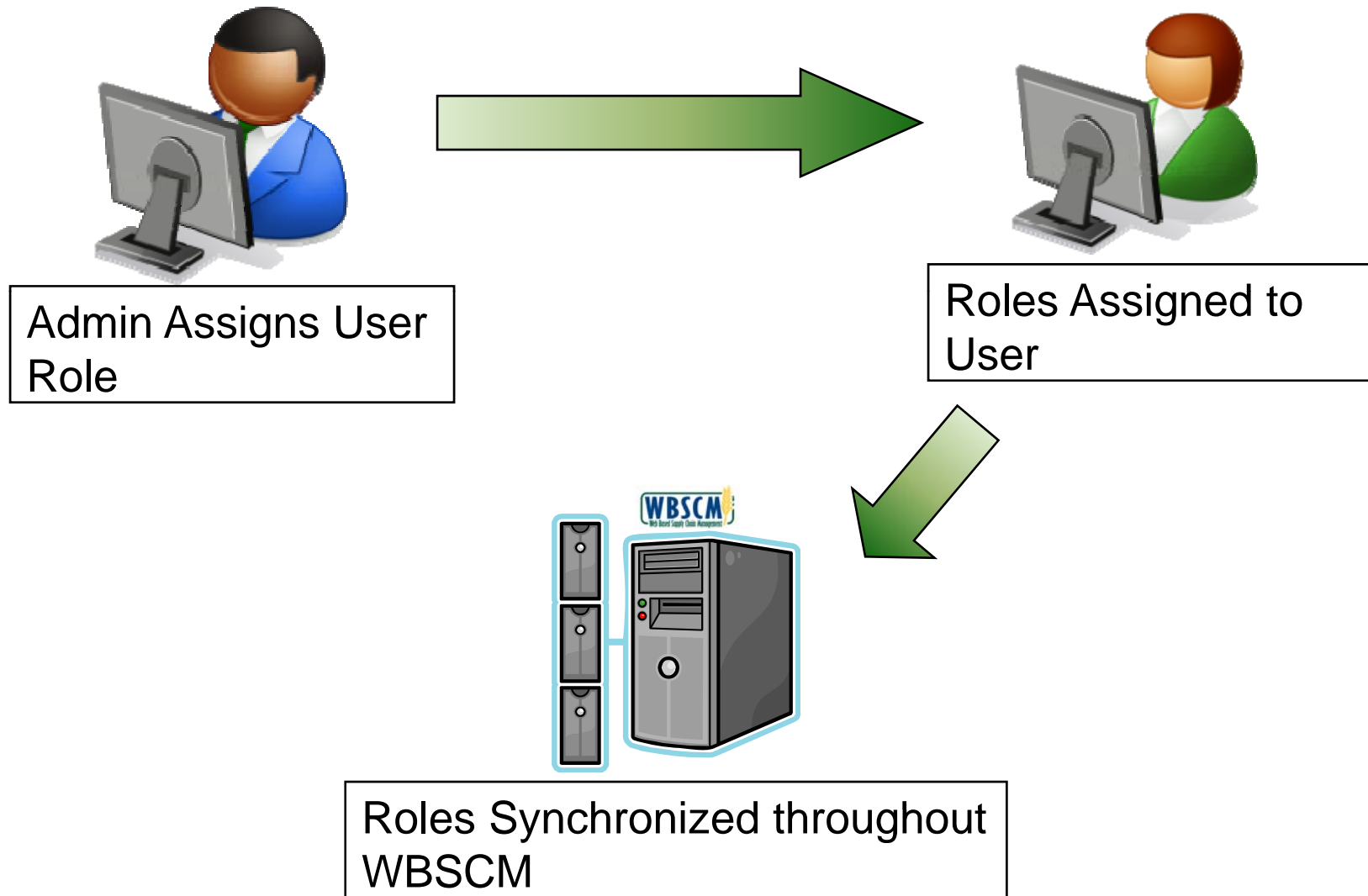
- Validation Checks
 - eAuth ID does not already have an assigned active WBSCM user
 - eAuth assurance level is sufficient for type of user
 - o Level 2 for government
 - o Level 1 for customers and vendors
 - WBSCM User's email addresses matches eAuth email address
 - WBSCM User's first name and last name match eAuth first name and last name
- Validation checks made the first time the user accesses WBSCM





Admin Assigns User Role

- Roles may be assigned at the same time as the user is created or at a different time
- Available security roles that the user administrator can assign are based on the administrator's role
- Delegated user administrators are limited to managing users within their own organization
- Downstream user administrators are limited to managing users in organizations lower in hierarchy



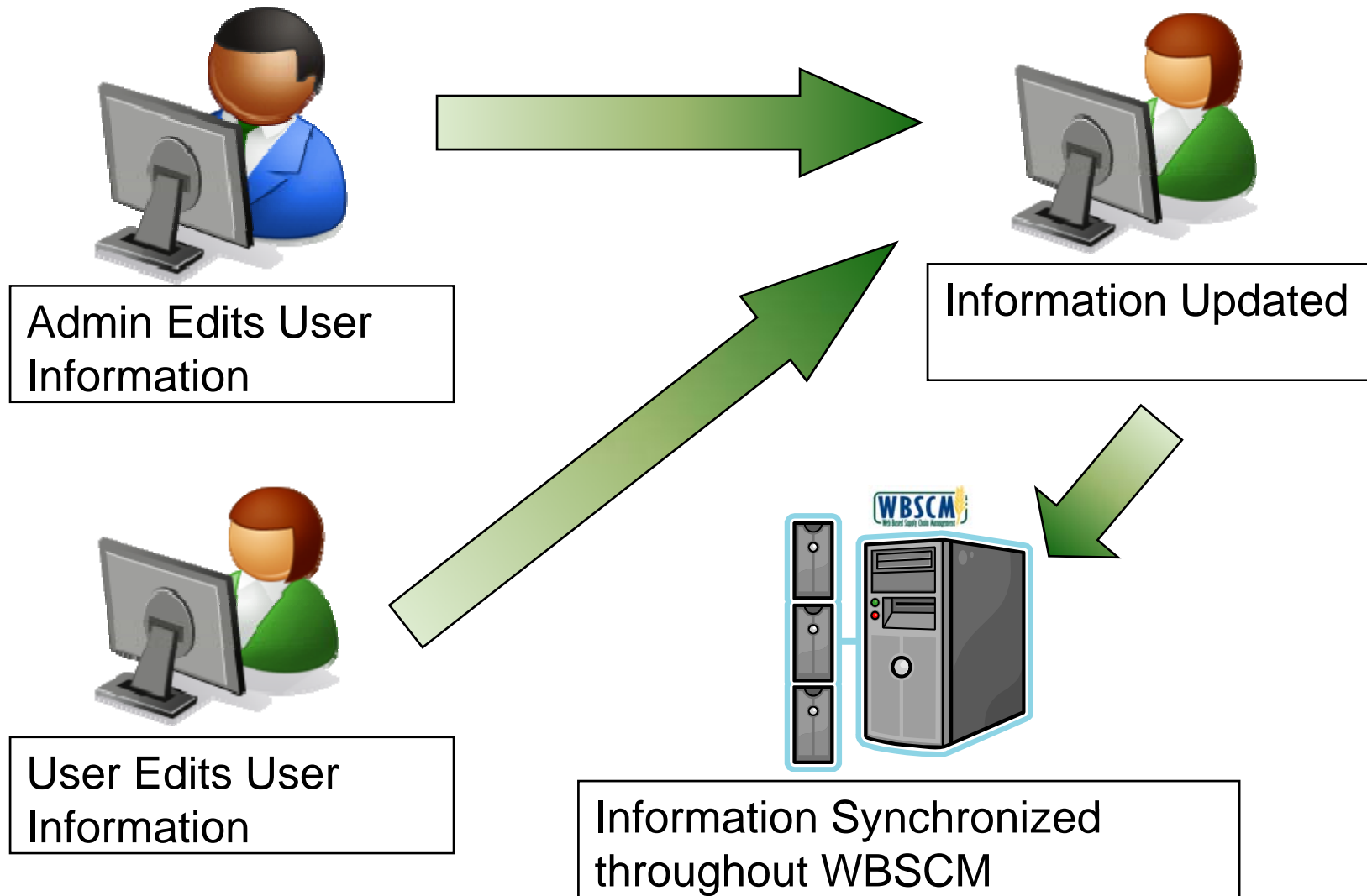


Admin Edits User Information



User Edits User Information

- Modify user information
 - First Name
 - Last Name
 - E-mail
 - Telephone
 - Mobile
 - Fax
- Lock / Unlock Users
- Delete Users
 - User are expired instead of deleted
- User can only modify personal information (name, email, telephone, etc.)





Questions & Answers