Personalize Reports in WBSCM

Instructions Handout

Personalize & Download WBSCM Reports

"*Get the data you need in the way you need it*"

4 ways:

- Manually Enter Criteria

- Set up Variant Queries

- Filter and Export

- Create Custom Views

# Access the Reports in WBSCM

What reports are available in WBSCM

- USDA Foods Entitlement
  - Track entitlement spending, check entitlement amount updates and ending balances
- Requisition Status
  - Monitor status of sales orders, check quantities, delivery periods and cancellations
- Value of Commodities Received
  - Report the value of USDA Foods received

Entitlement/Bonus Summary Report

Run this report to see:

- The preliminary USDA Foods Entitlement dollar amount distributed by ODE to your organization for the next school year (in January);

- The amount spent on direct delivery and/or diversion-processing;

- The amount set aside for the USDA DoD Fresh;

- The entitlement balance (remaining to spend);

- The final USDA Foods Entitlement value for the current school year after SY meal counts are actualized (in Nov-December).
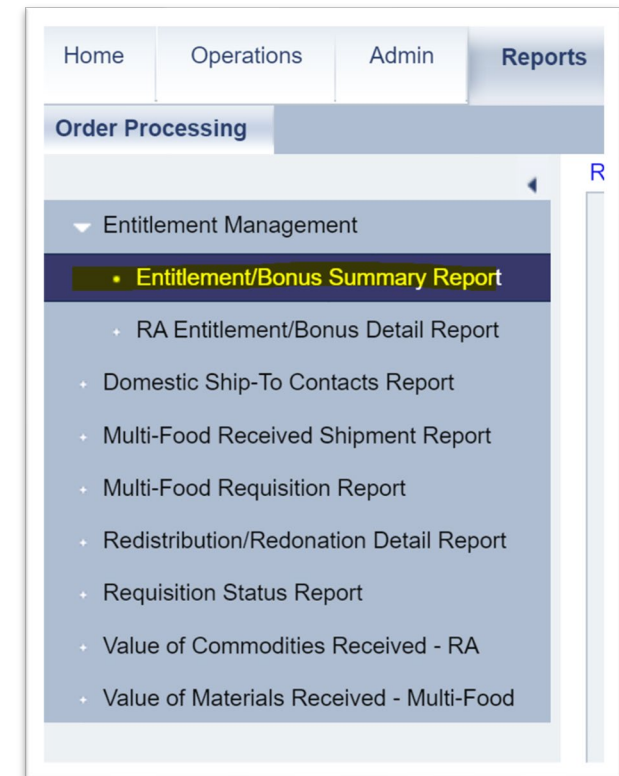
Entitlement/Bonus Summary Report
Manually Enter Criteria

1- Fill the **Program** box and the **Program Year** box *(enter only one year e.g. 2025 for school year 2024-25).*

2- Click 'Print to PDF' and save to your computer.

Note: PDF versions are pre-set by WBSCM and cannot be customized.

Welcome to Entitlement/Bonus Summary Report

All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YY

Search Criteria

Execute   Reset | Print to PDF | ℹ

* Program: ◇	NSLP	
* Program Year: ◇	2025	To
SDA Region Code: ◇		
RA / SDA Number: =	4008806	
Sold-To State: ◇		To

Entitlement/Bonus Summary Report
Set up Variant Query

Variants are prefilled queries. These are used when you want to duplicate the same query throughout the year.
1. Click 'Show Variants
2. Fill in your query as desired.
3. Title the Variant and Save.
4. Next time you run the report, click 'Show Variants', click inside 'Variant' box, type title to select and click 'Load'.

Entitlement/Bonus Summary Report
Filter and Export

The 'Filter and Export' option is possible when there is more than one line of data in the report.

Once you run the query, click 'Execute' to access the 'View' option.

Welcome to Entitlement/Bonus Summa

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

Search Criteria

⊕ Execute   ↻ Reset | 📄 Print to PDF   ℹ️

* Program:	◇	NSLP
* Program Year:	◇	2025	To
SDA Region Code:	◇	▣

View: ENTITLEMENT_SU... ▼ | Export ◢

Program	⇕	Sold-To Party	Sold-To Name	Sold-To City	Sold-To State	⇕	Program Year	⇕
NSLP		4000555	OR Dept. of Education	SALEM	OR		2025	

By default, the Entitlement Summary Report contains only one line of data.
Therefore, there is nothing to 'filter' or 'sort'.

Entitlement/Bonus Summary Report
Custom View

1. Once you have run the query, click 'Execute' to customize the view *(you have the option of editing the columns and the order of the display of columns).*
2. Scroll to the right and click on the picture of the wrench *(at the right corner of the gray bar).*
3. The Settings box will appear. You can remove or add the columns and change the sequence of columns as they display on the report.
4. Once you are finished, click 'Save as' and enter the name for your custom view *(if you want it to be the default report view, click the initial view box).*
5. Now, every time you run the query, you have a custom report in the dropdown box next to 'View' that you can view or export:

❶

Welcome to Entitlement/Bonus Summa
All required fields are marked with a red asterisk (*). Dates a

Search Criteria

⊕ Execute   ⟳ Reset | 📄 Print to PDF   ℹ

* Program: ◇ NSLP
* Program Year: ◇ 2025   To
SDA Region Code: ◇

❷

Beginning Balance   DOD Fresh Amount

❸

Settings

View ENTITLEMENT_SUMM ▼ Save Save as... Delete Properties...

| Column Selection | Sort | Calculation | Filter | Display |

Hidden Columns
- UoM
- Currency
- RA Zone
- RA ID
- Alternate RA ID

Add ▶
◀ Remove

Displayed Columns
- Program
- Sold-To Party
- Sold-To Name
- Sold-To City
- Sold-To State
- Program Year
- Beginning Balance
- DOD Fresh Amount

▼ ▼ ▲ ▲

❹

Save View as

* Description: My Entitlement Summary Report
Assignment: User
☐ Initial View

❺

Settings

View My Entitlement Summa ▼ Save Save as... Delete Properties...

ENTITLEMENT_SUMMARY
My Entitlement Summary Report
[Standard View]

Calculation   Filter   Displa

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RA Entitlement/Bonus Details Report

WBSCM

Run this report to see:

- All transactions since the ODE Ordering Period that impact entitlement, bonus items and items transferred between agencies.

- Beginning and Ending balances.

Important Notes:

- This report does not show
  - special "free" redonated items
  - cancelled orders and quantity

- WBSCM does not run entitlement reports for a particular date. Save a report regularly to see the changes and compare.

RA Entitlement/Bonus Details Report
Manually Enter Criteria

1- Fill the **Program** box and the **Program Year** box *(enter only one year e.g. 2025 for school year 2024-25).*

2- Click 'Print to PDF' and save it to your computer.

Note:

- PDF versions cannot be customized.

For example: the pdf of the RA Entitlement Details Report gives quantities in pounds not in cases. However, total pounds are useful to estimate ODE USDA Foods fees.

Welcome to RA Entitlement/Bonus Detail Report

All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YYYY.

Search Criteria

Execute   Reset | Print to PDF | [i]

* Program: ◇   NSLP

* Program Year: ◇   2025   To

RA Customer Number: =   4008806

Entitlement / Bonus: ◇

Order Type: ◇

RA Entitlement/Bonus Details Report
Set up Variant Query

Variants are prefilled queries. These are used when you want to duplicate the same query throughout the year.
1. Click 'Show Variants
2. Fill in your query as desired.
3. Title the Variant and Save.
4. Next time you run the report, click 'Show Variants', click inside 'Variant' box, select and click 'Load'.

RA Entitlement/Bonus Details Report
Filter and Export

The RA Entitlement Details Report is set to give a chronological spend down since the ODE Ordering Period. Therefore, filtering will not recalculate the amount available and the amount pending. However, the 'Order Date' column tracks everything that was ordered since ordering period.

1. Once you have run the query, click 'Execute' to access the View option
2. Inside the View, you can filter any column you like. You can filter out and/or sort data by clicking on the gray column headers.
3. When finished, click Export and the excel spreadsheet will include only the data you filtered or sorted.

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Welcome to RA Entitlement/Bonus Detail
All required fields are marked with a red asterisk (*). Dates are

Search Criteria

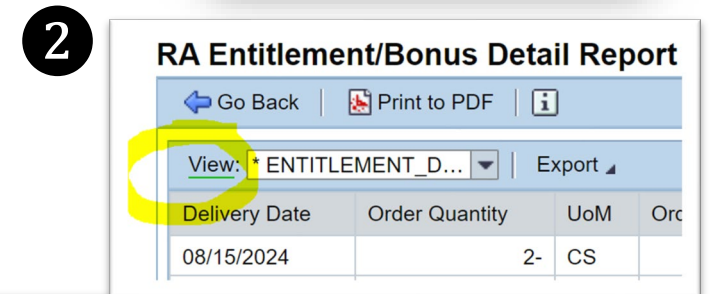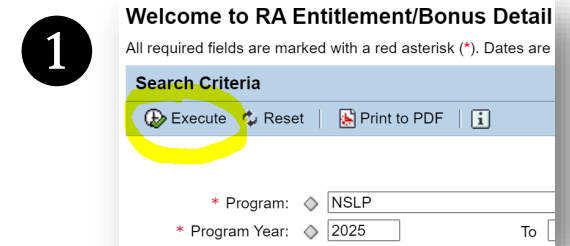⊕ Execute   ⟳ Reset | 📄 Print to PDF | ℹ️

* Program: ◇   NSLP
* Program Year: ◇   2025   To

❷

RA Entitlement/Bonus Detail Report

⬅ Go Back | 📄 Print to PDF | ℹ️

View: * ENTITLEMENT_D... ▼ | Export ▲

Delivery Date	Order Quantity	UoM	Ord
08/15/2024	2-	CS	

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RA Entitlement/Bonus Detail Report

⬅ Go Back | 📄 Print to PDF | ℹ️

View: * ENTITLEMENT_D... ▼   Export ▲   ▶ 👥

Delivery Date	Order Quantity	UoM	Order Quantity in LB	Avg. Cost / LB	Net Value	Ent. Amount Availabl	Ent. Amount Pending
07/15/2024	800	LB	800	0.30	238.56	153,280.22	153,041.66
07/31/2024	19	CS	760	5.58	4,239.13	153,041.66	148,802.53
08/15/2024	100	CS	3,825	0.59	2,243.75	148,802.53	146,558.78

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RA Entitlement/Bonus Details Report

Custom View

❶

Search Criteria

⊕ Execute   ↻ Reset | 📄 Print to PDF | ℹ️

* Program: ▬ NSLP
* Program Year: ▬ 2025   To [   ]
RA Customer Number: ▬ 4008806
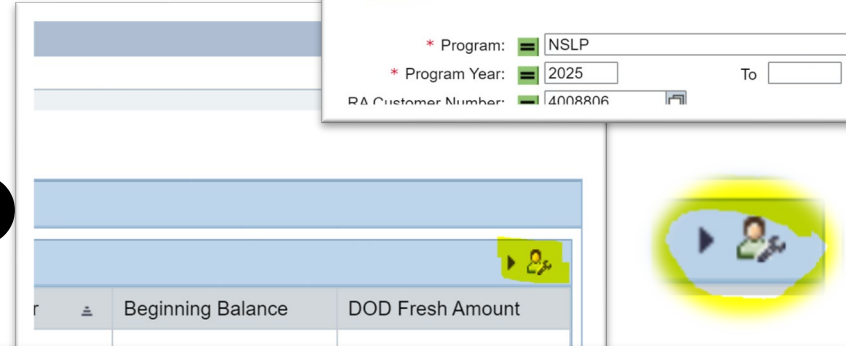
1. Once you have run the query, click 'Execute' to customize the view *(you have the option of editing the columns and the order of the display of columns).*

2. Scroll to the right and click on the picture of the wrench *(at the right corner of the gray bar).*

3. The Settings box will appear. You can remove or add the columns and change the sequence of columns as they display on the report.

4. Once you are finished, click 'Save as' and enter the name for your custom view *(if you want it to be the default report view, click the initial view box).*

5. Now, every time you run the query, you have a custom report in the dropdown box next to 'View' that you can view or export.
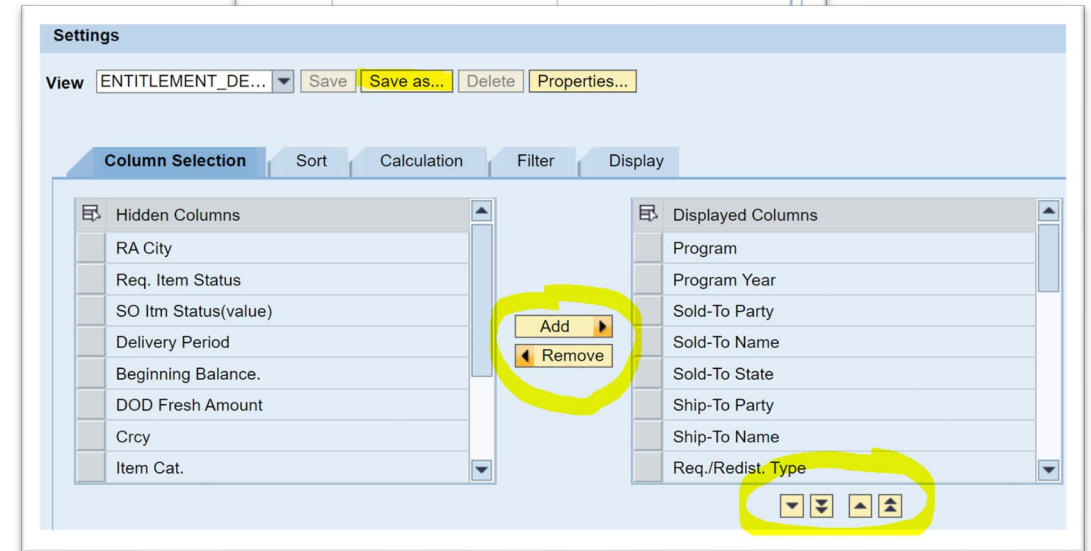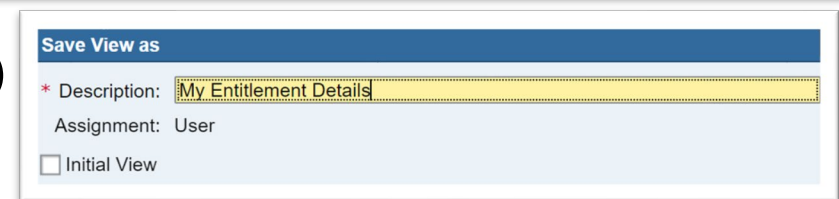
❷

Beginning Balance   DOD Fresh Amount

❸

Settings

View ENTITLEMENT_DE... ▼ Save Save as... Delete Properties...

| Column Selection | Sort | Calculation | Filter | Display |

Hidden Columns
- RA City
- Req. Item Status
- SO Itm Status(value)
- Delivery Period
- Beginning Balance.
- DOD Fresh Amount
- Crcy
- Item Cat.

Add ▶
◀ Remove

Displayed Columns
- Program
- Program Year
- Sold-To Party
- Sold-To Name
- Sold-To State
- Ship-To Party
- Ship-To Name
- Req./Redist. Type

▼ ⤓ ▲ ⤒

❹

Save View as

* Description: My Entitlement Details
Assignment: User
☐ Initial View

❺

Settings

View My Entitlement Details ▼ Save Save as... Delete Properties...
ENTITLEMENT_DETAIL
ENTITLEMENT_REPORTS
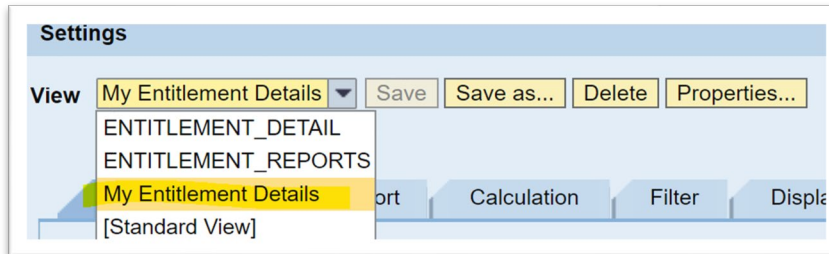My Entitlement Details   ort   Calculation   Filter   Displa
[Standard View]

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# Requisition Status Report

Run this report to see:

- The **current status** of your orders. See if ordered items have been submitted to USDA or cancelled, if delivery dates or quantities have changed, or if items have been delivered to the warehouse. *Refer to status text used in reports on the next slide.*

- Items transferred show as 'applied' (when cases are redistributed between agencies)

Important Notes:

- This report does not show the date of the orders delivered to the schools.

- Run a report regularly to see the changes in status text and what 'Order Received' items have arrived in the state warehouse.
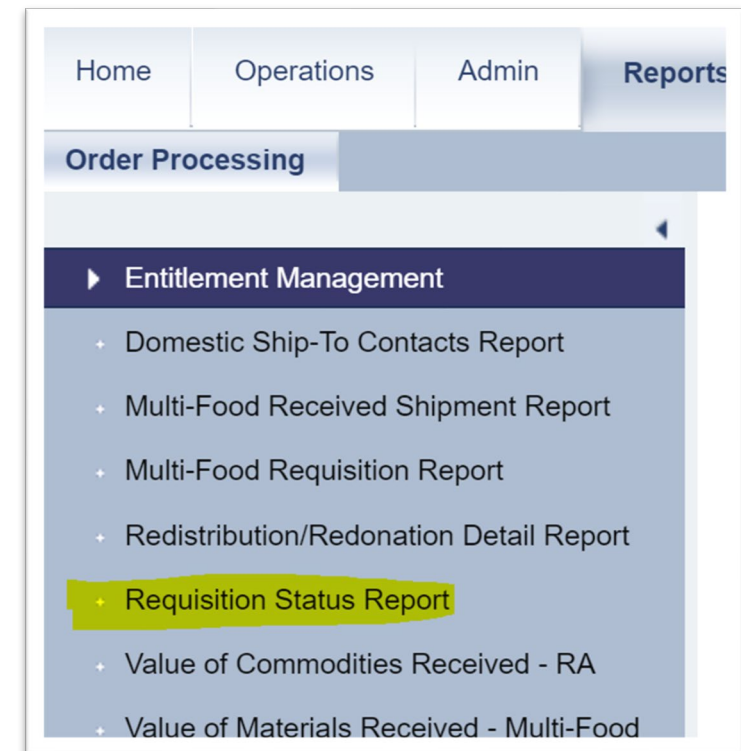
Understanding Status Text Changes

Status	What does it mean
Ready for Approval	Orders in WBSCM. ODE has to approve.
Approved by SDA	ODE has approved and submitted full trucks to USDA.
Approved by SPAgency	Approved by USDA.
On invitation	USDA purchasing activities.
Purchased	USDA has purchased the products, price is locked, and food is shipped.
Order Received	USDA Foods has arrived at the State Warehouse.
Cancelled	Order is cancelled.
Returned by: SDA/SPAgency/FSA/AMS	Order is returned for changes.

Requisition Status Report
Manually Enter Criteria

1- Fill the **Program** box and the **Req. Delivery Date** boxes *(enter only one school year e.g. 07/01/2024 to 06/30/2025).*

If you operate several programs, leave the Program box blank.

2- Click 'Print to PDF' and save it to your computer.

Note:
- PDF versions are pre-set by WBSCM and cannot be customized.

Welcome to Requisition Status Report

All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YYYY.

Search Criteria

Execute   Reset | Print to PDF |

Program:	◇	NSLP	
Req. Delivery Date:	◇	07/01/2024	To 06/30/2025
Material:	◇		To
Sold-To Party:	◇	4008806	

Requisition Status Report
Set up Variant Query

Variants are prefilled queries. These are used when you want to duplicate the same query throughout the year.
1. Click 'Show Variants
2. Fill in your query as desired.
3. Title the Variant and Save.
4. Next time you run the report, click 'Show Variants', click inside 'Variant' box, type title to select and click 'Load'.

Requisition Status Report
Filter and Export

1. Once you have run the query, click 'Execute' to access the 'View' option.
2. Inside the View, you can filter any column you like to see only the data you are looking for. *For example, click 'Material Desc.' and filter for 'Applesauce'*
3. Click Export and the excel spreadsheet will include only the data you filtered and/or sorted.

❶

Welcome to Requisition Status Report

All required fields are marked with a red asterisk (*). Dates are formatted as: M

Search Criteria

⊕ Execute   ↻ Reset   📄 Print to PDF   ⓘ

Program:	◇		
Req. Delivery Date:	◇	07/01/2024 📅	To	06/30/2025
Material:	◇		📅 To	

❷

Requisition Status Report

⬅ Go Back | 📄 Print to PDF | ⓘ

View: REQUISITION_STA... ▼ | Export ▲

Req/Redist. Doc.Type ▽	Req/Redist. Order # ≜	Req/Redist. Item # ≜	Req/Redist. Status
ZREQ	1000666244	100	Cancelled
	1000666298		Approved by SDA

❸

View: * REQUISITION_ST... ▼ | Export ▲

Ship-To Party	Ship-To Name	Material	Material Desc. ▽	Prod. Hierarchy	Requested Del. Date	Program
5006059	GS Foods	110541	APPLESAUCE UNSWEETENED CAN-6/10	FRUIT/APPLES/CANNED	07/31/2024	NSLP
5006059	GS Foods	110541	APPLESAUCE UNSWEETENED CAN-6/10	FRUIT/APPLES/CANNED	07/31/2024	NSLP
5006059	GS Foods	110541	APPLESAUCE UNSWEETENED CAN-6/10	FRUIT/APPLES/CANNED	07/31/2024	NSLP
5006059	GS Foods	110541	APPLESAUCE UNSWEETENED CAN-6/10	FRUIT/APPLES/CANNED	07/31/2024	NSLP
5006059	GS Foods	110541	APPLESAUCE UNSWEETENED CAN-6/10	FRUIT/APPLES/CANNED	07/31/2024	NSLP

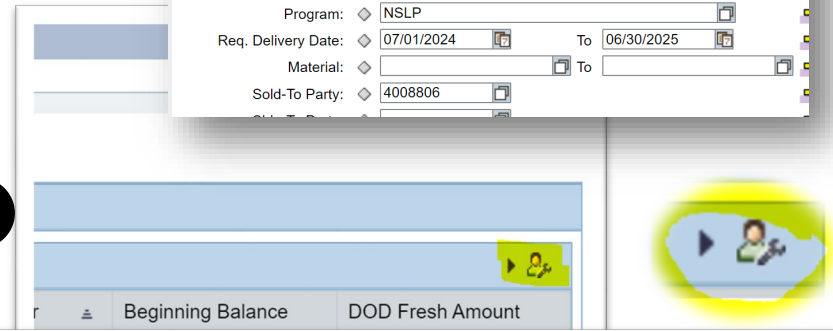| al	Material Desc.	▽	Pro
	APPLESAUCE UNSWEETENED CAN-6/10		FRU
	APPLESAUCE UNSWEETENED CAN-6/10		FRU
	APPLESAUCE UNSWEETENED CAN-6/10		FRU
	APPLESAUCE UNSWEETENED CAN-6/10		FRU
	APPLESAUCE UNSWEETENED CAN-6/10		FRU

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Requisition Status Report
Custom View

1. Once you have run the query, click 'Execute' to customize the view *(you have the option of editing the columns and the order of the display of columns).*
2. Scroll to the right and click on the picture of the wrench *(at the right corner of the gray bar).*
3. The Settings box will appear. You can remove or add the columns and change the sequence of columns as they display on the report.
4. Once you are finished, click 'Save as' and enter the name for your custom view *(if you want it to be the default report view, click the initial view box).*
5. Now, every time you run the query, you have a custom report in the dropdown box next to 'View' that you can view or export.
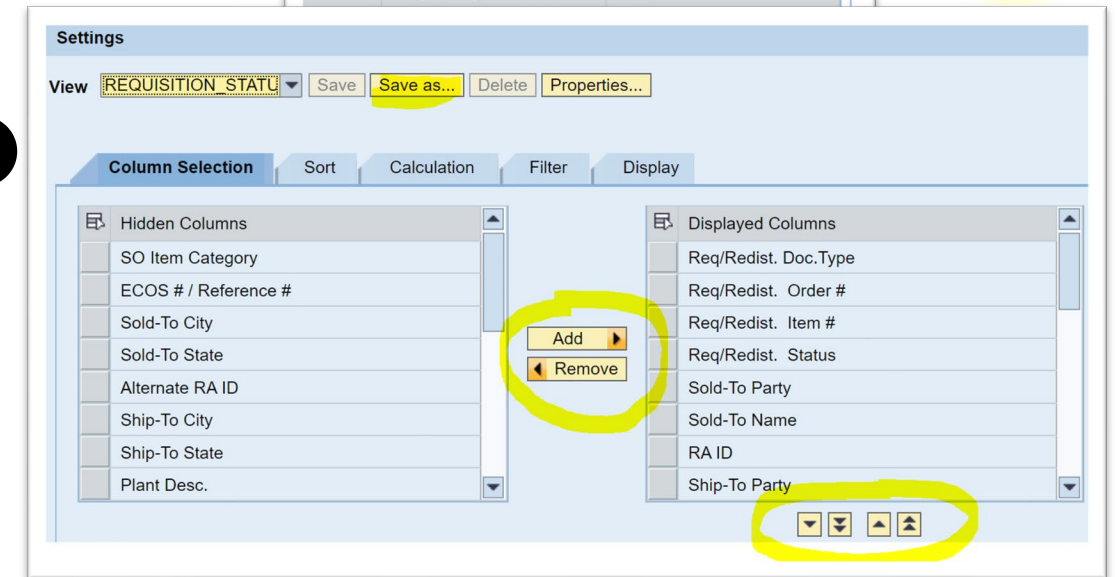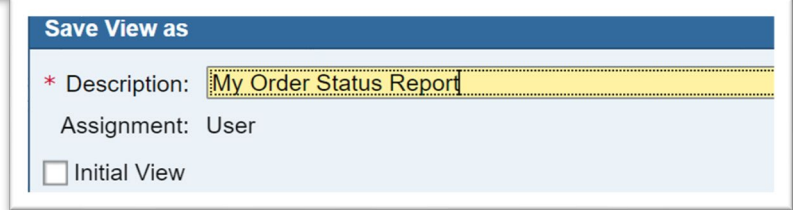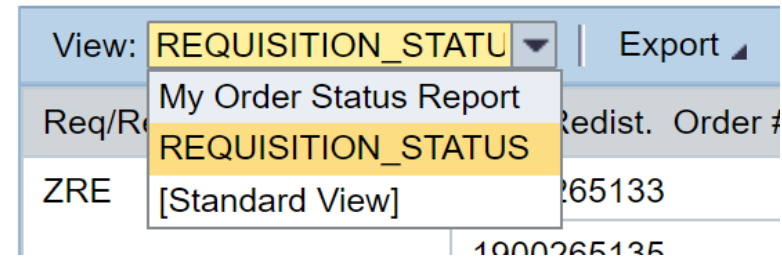
❶

Welcome to Requisition Status Report
All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YYYY.

Search Criteria
⊕ Execute   ⟳ Reset | 🅐 Print to PDF   ⓘ

Program: ◇ NSLP
Req. Delivery Date: ◇ 07/01/2024   To   06/30/2025
Material: ◇   To
Sold-To Party: ◇ 4008806

❷

Beginning Balance   DOD Fresh Amount

❸

Settings

View REQUISITION_STATU ▼ Save Save as... Delete Properties...

| Column Selection | Sort | Calculation | Filter | Display |

Hidden Columns
- SO Item Category
- ECOS # / Reference #
- Sold-To City
- Sold-To State
- Alternate RA ID
- Ship-To City
- Ship-To State
- Plant Desc.

Add ▶
◀ Remove

Displayed Columns
- Req/Redist. Doc.Type
- Req/Redist. Order #
- Req/Redist. Item #
- Req/Redist. Status
- Sold-To Party
- Sold-To Name
- RA ID
- Ship-To Party

❹

Save View as

* Description: My Order Status Report
Assignment: User
☐ Initial View

❺

View: REQUISITION_STATU ▼ | Export ▾

Req/R   My Order Status Report   Redist. Order #
         REQUISITION_STATUS
ZRE   [Standard View]   265133
                                  1900265135

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Value of Commodities Received Report

Run this report to see:

- The value of all direct delivery orders (including bonus/free items) received in the state warehouse;

- The value of all diversion-processing orders received by the processors (excluding redistributed free pounds from previous year);

Important Notes:

- This report does <u>not</u> show the date of the orders received in the schools.

- This report does <u>not</u> include the value of DoD Fresh produce received or the Unprocessed Pilot produce.

Value of Commodities Received Report
Manually Enter Criteria

1- Fill the **Req. Delivery Date** boxes
(e.g. 07/01/2024 to 06/30/2025)

Leave the Program box blank.

2- Click 'Print to PDF' and save it to your computer.

Note: PDF versions are pre-set by WBSCM and cannot be customized.

Welcome to Value of Commodities Received - RA

All required fields are marked with a red asterisk (*). Dates are formatted as: MI

Search Criteria

Execute   Reset | Print to PDF | i

Program:	◇			
Shipment Receipt Date:	◇		To	
Req. Delivery Date:	◇	07/01/2024	To	06/30/2025
Material:	◇		To	
Sold-To Party:	◇	4008806		
Ship-To Party:	◇			

Value of Commodities Received Report
Set up Variant Query

Variants are prefilled queries. These are used when you want to duplicate the same query throughout the year.
1. Click 'Show Variants
2. Fill in your query as desired.
3. Title the Variant and Save.
4. Next time you run the report, click 'Show Variants', click inside 'Variant' box, type title to select and click 'Load'.

Value of Commodities Received Report
Filter and Export

1. Once you have run the query, click 'Execute' to access the 'View' option.
2. Inside the View, you can filter or sort any column you like to see only the data you are looking for. *For example, click 'Date Received' and select 'Ascending' to see all items received since July.*
3. Click 'Export' and the excel spreadsheet will include only the data you filtered and/or the way it was sorted.

Welcome to Value of Commodities Received - RA

All required fields are marked with a red asterisk (*). Dates are formatted as: M

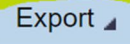**Search Criteria**

Execute   Reset   Print to PDF

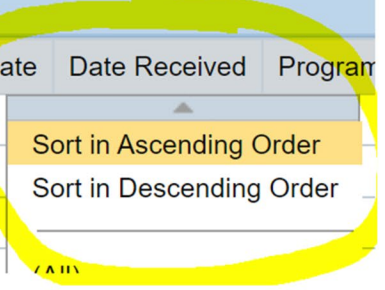| Program: | |
| Shipment Receipt Date: | | To |
| Req. Delivery Date: | 07/01/2024 | To 06/30/2025 |

Value of Commodities Received - RA

Go Back | Print to PDF | i

View: VAL_COMM_RCVD...   Export

Material	Material Desc.	Prod. Hierarchy	Requested Del. Date	Date Received	Program
100420	FLOUR BAKER HEARTH UNBLCH-BULK	FLOUR/BAKER/BULK	07/15/2024		
100336	SPAGHETTI SAUCE MEATLESS CAN-6/10	VEGETABLES/TOMATOES/CANNED	08/15/2024		
100362	BEANS REFRIED CAN-6/10	VEGETABLES/BEANS/CANNED	09/30/2024		
110633	BLUEBERRY HIGHBUSH FRZ CTN 12/2.5 LB	FRUIT/BLUEBERRY/FROZEN	08/31/2024	(All)

Sort in Ascending Order
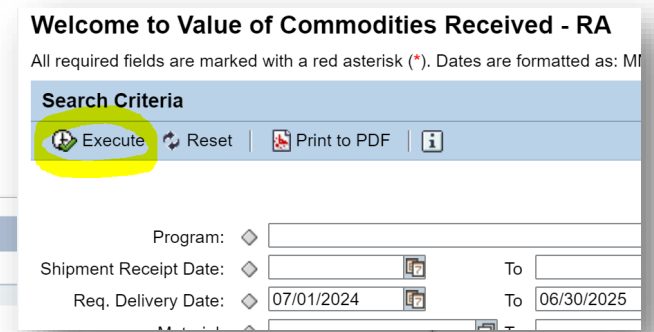Sort in Descending Order
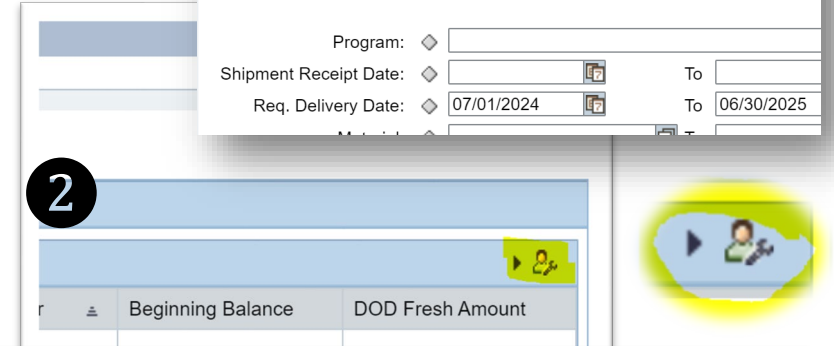
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Value of Commodities Received

Custom View

1. Once you have run the query, click 'Execute' to customize the view *(you have the option of editing the columns and the order of the display of columns).*
2. Scroll to the right and click on the picture of the wrench *(at the right corner of the gray bar).*
3. The Settings box will appear. You can remove or add the columns and change the sequence of columns as they display on the report.
4. Once you are finished, click 'Save as' and enter the name for your custom view *(if you want it to be the default report view, click the initial view box).*
5. Now, every time you run the query, you have a custom report in the dropdown box next to 'View' that you can view or export.
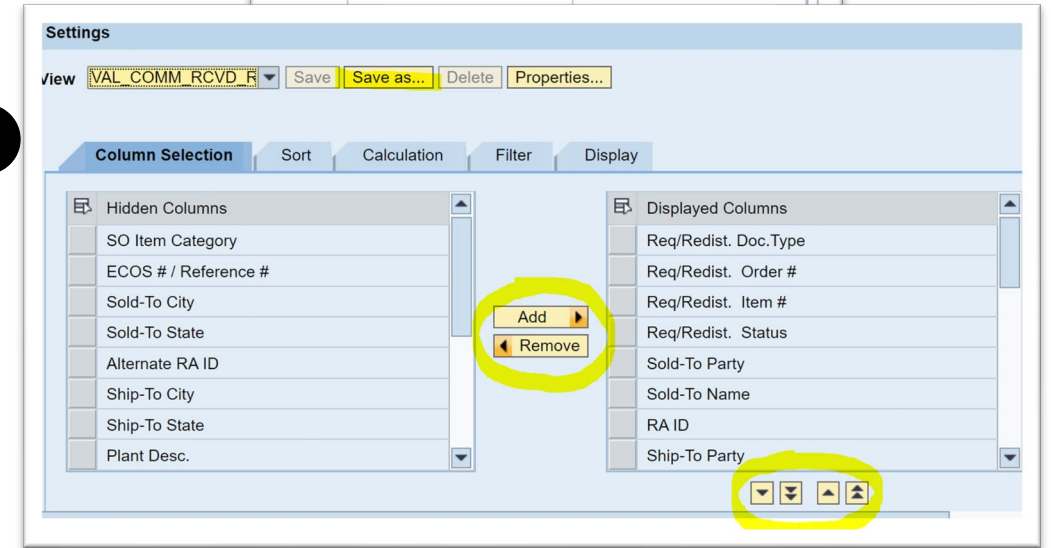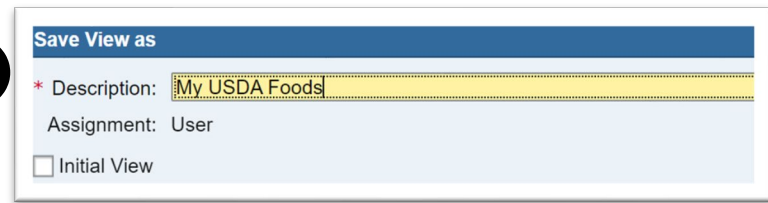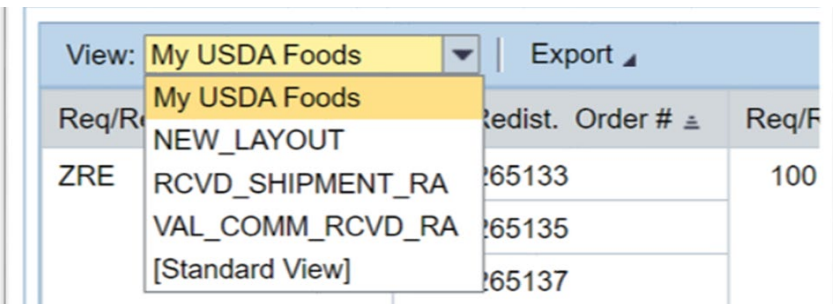

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Questions?

If you need assistance or have questions,

please email the ODE USDA Foods Distribution Team at

ode.usdafoods@ode.oregon.gov.

Thank you.