

WBSCM UPDATE

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FEATURE

WBSCM Readiness: Records Management

The previous issues of the WBSCM update featured the agencies' Go-Live collaborative activities focused on USDA System Integration Testing (SIT) Validation Activities.

The WBSCM team (USDA, USAID and SRA) continues to execute WBSCM development, testing, training, data maintenance, and governance activities.

This issue of the WBSCM update focuses on Records Management. For release one, Records Management is utilized for management of Procurement related documents.

Records management

Records Management is an SAP application that enables a single view of a variety of types of enterprise content, including WBSCM business transactions, SAP links, non-SAP content, workflow circulars, etc., It also provides USDA with a mechanism to integrate business transactions, documentation, and data that originate within SAP and non-SAP systems such as BEOS. This single view / mechanism is delivered in the form of an electronic file, also called a record.

Benefits of Records Management:

- Documents are stored electronically
- All documents are linked together and easily displayed
- Records can come in almost any format (includes MS Office documents, PDF files, emails, text files, zipped files etc.)

- Integrated with MS Word and Excel to support creation of document content directly within the application
- Documents can be uploaded to Records Management from a desktop or external file location
- All content can be searched and accessed by users (depending on their role)

Users will use Records Management to maintain the following record types:

- BP (Vendor) records
- Purchase Requisition records
- Solicitation (bid invitation) records
- Purchase Order records
- Contract (IDIQ) records

Records Management Tabs

The History tab and the Search tab are displayed when you first access the Records Management screen. On the initial Records Management screen under the History tab, a list of the 20 most recent documents accessed will appear as shown in Figure 1 below.

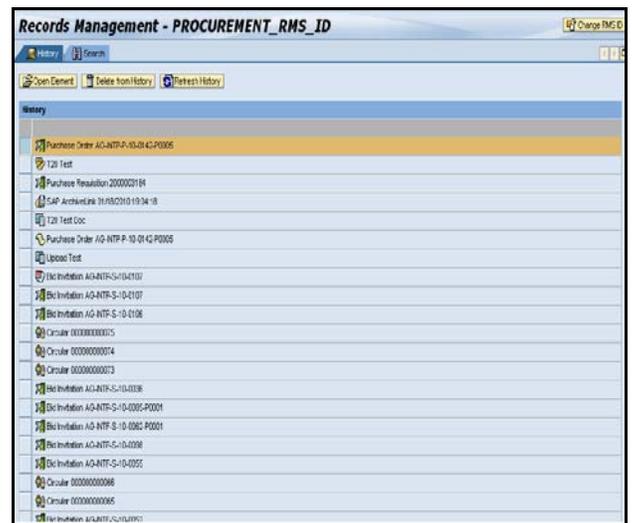


Figure 1

Users can also choose to search for Records Management documents. Search enables users to easily find and access any record and/or content.

In order to start searching, select which type of search to conduct first (i.e. procurement, document, circular) as shown in Figure 2.



Figure 2

Records Management Documents

All documents in Records Management will open in a new tab. This allows the user to toggle between documents without closing them.

When a user changes a Solicitation or Purchase Order document, Records Management will record a PDF snapshot each time it is changed. For example, clicking the Change button and placing a document into change mode will trigger this snapshot file's creation. The user may select these snapshots and they will open in a new window. These snapshots can be used to view different versions of the document as it has evolved.

Additional Capabilities

The SAP Procurement for Public Sector industry solution that is used with WBSCM provides additional Records Management capabilities that enable automatic creation of solicitation and contract files.

These electronic files have a folder structure to help store and manage content. This structure was designed according to USDA needs and based on the type of content required by FAR. An example of the structure is shown in Figure 3.

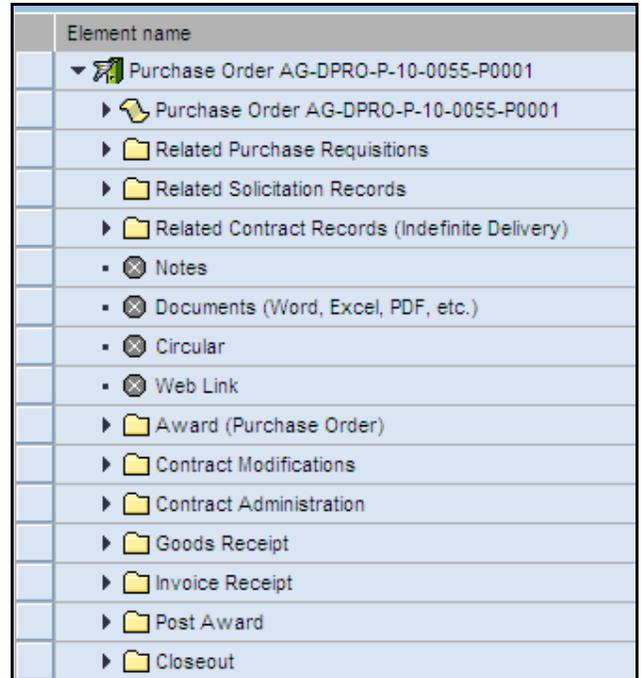


Figure 3

Note the various types of content that can be stored in Records Management. These include links to the originating Purchase Order, Goods Receipt, and Invoice Receipt documentation.

Through customization, Records Management can also create records for Vendor Master Data.

Circulars

Records Management supports ad-hoc work flow processes in the form of Circular objects. These Circulars can be used to distribute record content electronically to any user(s) on the system for review and approval.

Circulars will be used in the following areas:

- Circulation of freight bid invitations to freight forwarders
- Circulation of central vendor documentation required for review and approval
- Review and approval of various types of contract file and solicitation file documentation.

In an international example on the use of a Circular, USDA users want to attach certain ocean freight related documents to a Freight Purchase Order (PO). The figure below shows certificates and forms added to the Invoice Receipt Folder.

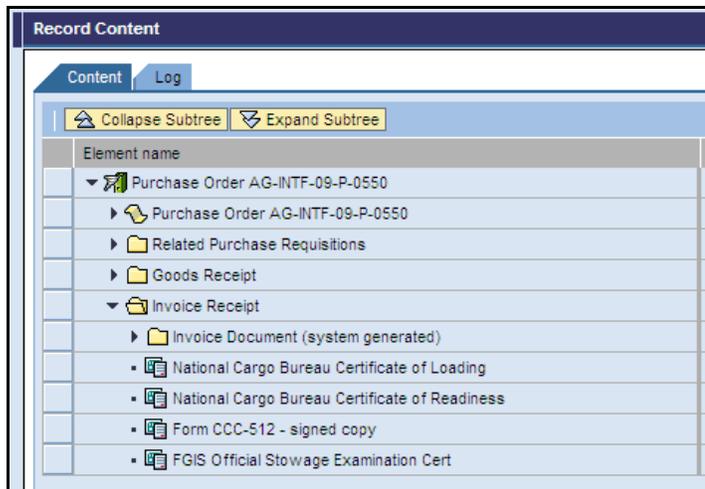


Figure 4

Figure 4 shows the use of a Circular in the form of attaching certain documentation to the freight PO to support follow-on processes such as receipting and invoicing. In this example, we use Circulars to circulate these documents for review.

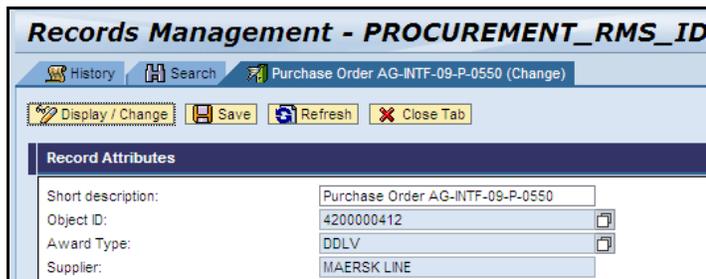


Figure 5

Figure 5 shows additional attributes on the record for the PO such as a short description, object ID, award type, and supplier.

In another example (domestic) on the use of a Circular, USDA users responsible for approving new vendors might want to review a vendor's subcontracting plan. In the figure below, a subcontracting plan document added to the Vendor file, then circulated for comments and feedback is shown.



Figure 6

The Smith Farming Subcontracting Plan document and a Circular is shown here. If we open the Circular, the following can be seen as shown in Figure 7.

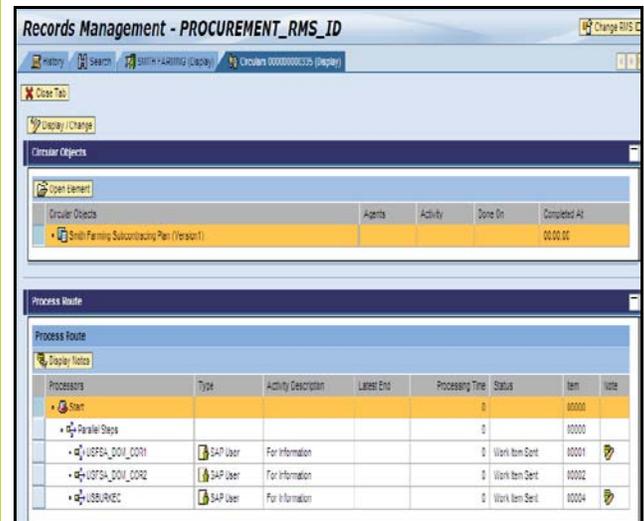


Figure 7

The document has been attached for review with three people setup to review it.

New to WBSCM?

If you are new to the WBSCM team, you can go online and view the [WBSCM Overview Course](#). This course is available by selecting the link above. Topics include WBSCM overview, technologies, basics of the SAP order process, and the program timeline.

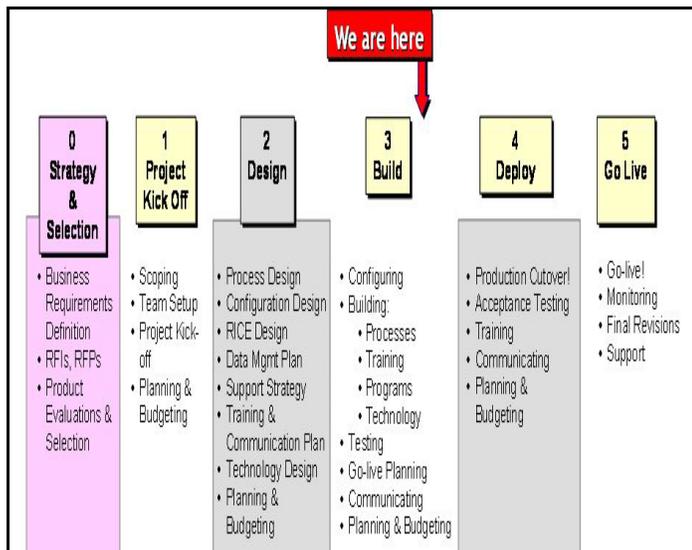


What's My Role?

You can gain more insight and awareness into WBSCM functionality through the viewing of online demonstrations (over 30 simulations are available) and general WBSCM information in preparation for training. All WBSCM information is found on AGNISX or agency-specified sites.

STATUS CORNER

The list of playbacks to date can be found in previous editions of the WBSCM Update on the [WBSCM Program Website](#).



The WBSCM team is currently near the end of the Build phase.



NEXT MONTH

We will feature the various agencies' activities focused on "WBSCM Go-live Readiness".



DID YOU KNOW?

... [USDA Enhances Integrity And Defensibility of Farm Programs and Streamlines Payment Limits For Family Farmers](#)

... [Vilsack Names Members To Fruit And Vegetable Industry Advisory Committee](#)

... [USDA Invites State Participation in National Effort to Create New Opportunities, Reduce Barriers in Bringing Agricultural Products to Market](#)



ED CORNER

WBSCM Terminology

Circular – Workflow that allows users to upload attachments and make comments to procurement documents.

Business Object – The actual procurement document opened in Records Management

PDF Snapshot – Taken whenever Bid Invitation or Award is put in change mode



ASK US

We'd appreciate your thoughts and feedback! Please email any WBSCM questions or suggestions you have to:

WBSCM@kcc.usda.gov

You can find more WBSCM information on the [WBSCM Program Web site](#).