



## Distribution Pounds by County Report with XML Export

### **Purpose of this document**

The Distribution Pounds by County Report in Ceres includes an option to generate an XML file for upload to HungerNet. This document covers the export process

*Ceres Object release 5.00.00 is required for the functionality described in this document.*

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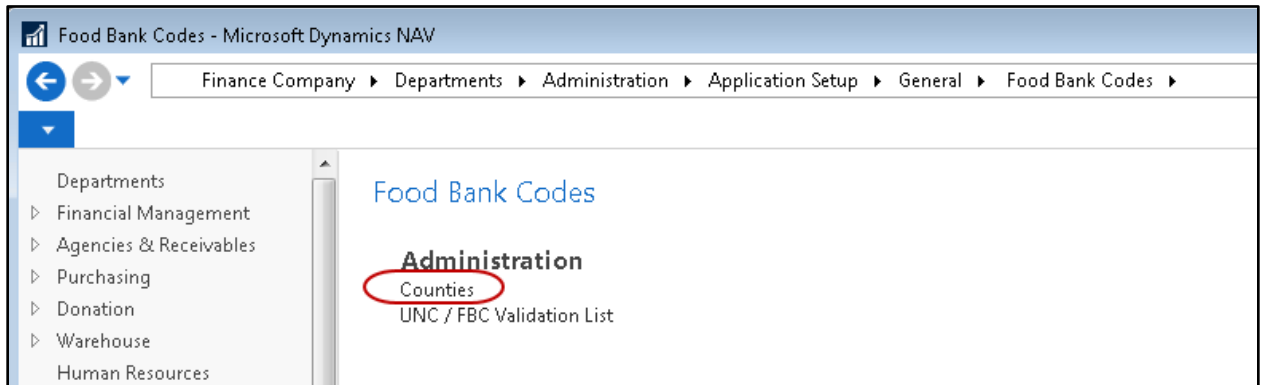
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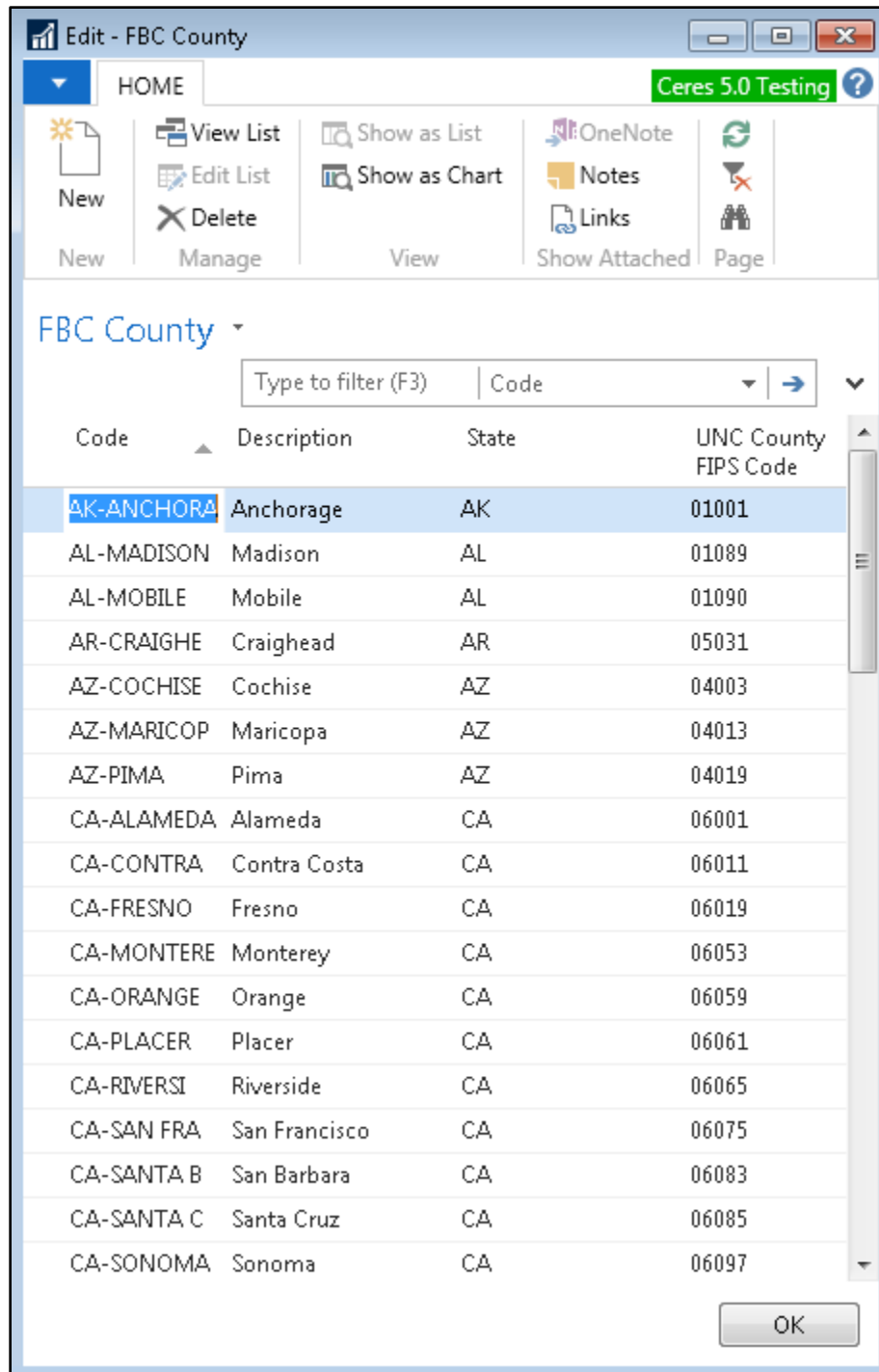
## Setup

Prior to generating the Report and/or XML file for upload to HungerNet, the following setup steps need to be completed. For an even longer review see the Feeding America Reporting Procedure.

1. UNC County Codes
  - a. Verify with Feeding America that the import process has been run to populate the UNC County Codes.
  - b. The UNC County Codes can be accessed from Departments → Administration → Application Setup → General → Food Bank Codes → Counties.



2. Link the FBC County Code to the appropriate UNC County FIPS Code.
  - a. For each FBC County Code listed, select the appropriate UNC County FIPS Code from the edit assist list or enter it manually.



### 3. Mobile Pantry Drops Indicator

- An indicator has been added to the Agency Card, Information Tab to designate if Agency Orders from the Agency should be considered
- The Agency List can be accessed from Departments → Agencies & Receivables → Agency Relations → Lists → Agencies.
- Once an Agency is selected, Click Actions → Edit to edit the details of that Agency.

B0129 · Safehome, Inc.

General

Address & Contact

Invoicing

Payments

Information

**Agency Express**

Agency Group Code: 120

Permit Web Orders: ☒

AE Survey Online Order Status: Enabled

AE Quest. Applicable Date:

Ceres Questionnaire Grp. Code:

Survey Group Code:

**Agency Type & Information**

Service Areas:

Product Sources:

Funding Sources:

Client Records Maintained: ☐

UNC Food Bank ID No.:

SDO: ☐

Food Bank Program: ☐

FBC Program Type: ON-SITE FD

FBC Size Code:

Mobile Pantry: ☒

**Other**

CMobile Related: ☐

Exclude from Compliance: ☐

**Location & Government**

Geographical Location Code:

Metropolitan Area Code:

Federal Congr. Dist. Code:

State Congr. Dist. Code:

Senate District:

City Council District:

Ward:

School District:

Attribute Count: 3

Affiliation Count: 2

Tier Count: 1

Shipping

- d. If the Mobile Pantry indicator on the Agency Card is selected, the user will be prompted with the following:

Microsoft Dynamics NAV

Do you want to update Mobile Pantry = Yes on all documents related to Agency B0129?

Yes No

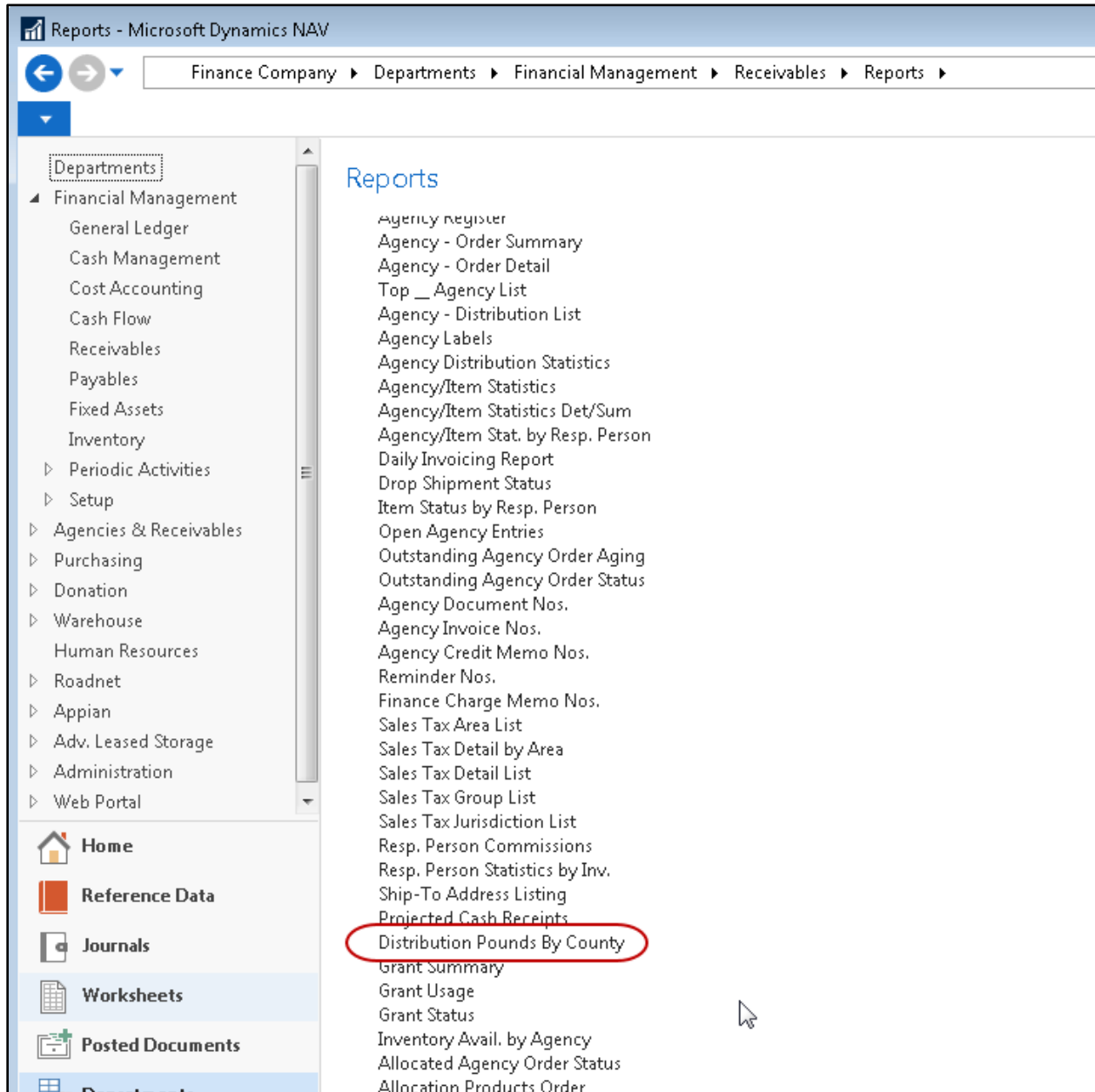
A **“Yes”** answer will set the Mobile Pantry indicator on the Agency Card and on all posted Agency Orders for that Agency. The Mobile Pantry Drop indicator will also be defaulted to **“Yes”** for any new Agency Orders for this Agency.

A **“No”** answer will set the Mobile Pantry indicator on the Agency Card and the Mobile Pantry Drop indicator will be defaulted to **“Yes”** for any new Agency Orders for this Agency. No existing transactions will be updated.

**Note:** While the Mobile Pantry indicator will be defaulted to **“Yes”** on any new Agency Orders, the indicator can be set to **“No”** on an Agency Order if that specific Agency Order is not a Mobile Panty Drop.

## Distribution Pounds by County Report


1. Click Departments → Financial Management → Receivables → Reports → Distribution Pounds by County.



2. This will open the request page.

Edit - Distribution Pounds By County

**ACTIONS** Ceres 5.0 Testing ?

 Clear Filter Page

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**Options**

Display Agency: ☐

Do not Validate Agency: ☐

Begin Date: 9/1/2019 ▼

End Date: 12/31/2019 ▼

Export XML: ☐

Report Type: Quarterly ▼

---

**Item Ledger Report View**

**Show results:**

✗ Where Inventory Posting Group ▼ is Enter a value.

✗ And Branch Code ▼ is Enter a value.

✗ And FBC County Code ▼ is Enter a value.

+ Add Filter

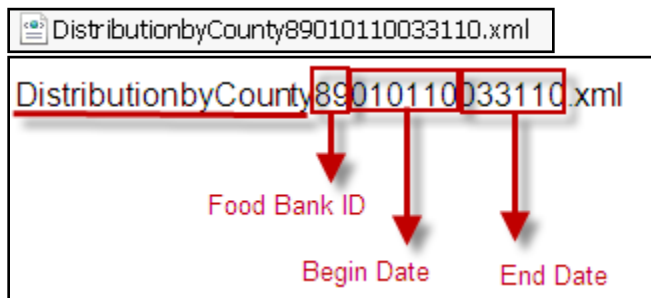
Print... ▼   Preview   Cancel

3. If the Export XML option is not selected:
  - a. The report can be run for any Begin Date and End Date
  - b. The XML file will not be created.
4. If the Export XML option is selected:
  - a. The report can only be run for a Begin Date and End Date that spans a complete Month or Quarter depending upon which Report Type has been selected.
  - b. The Report Type "Monthly" or "Quarterly" must be selected and match the period covered by the Begin Date and End Date.
  - c. The Period Number must be specified and match the Report Type selected and the period covered by Begin Date and End Dates.

- d. The XML file will be created in the location specified in the Temp Path field for the user running the report. This path is normally set to "C:\NAVTEMP\". Once saved it is recommended to move the report to a location on your network so that more than just the person running the export can access the file.

User Setup																	
																	Temp Path
ESOPRO\CJW																	C:\NAVTEMP\
ESOPRO\UBL	10/2/2018	4/9/2020															C:\NAVTEMP\
ESOPRO\RXF	12/1/2019	2/29/2020															C:\NAVTEMP\
ESOPRO\WWH																	C:\NAVTEMP\

5. The XML file will be named by process as follows:



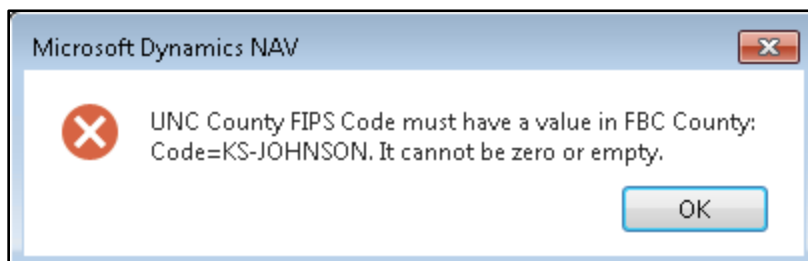
6. Amounts on both the Report and XML Export are now rounded to the nearest whole number.

```

<county fipsCode="36017" state="NY" county="CHENANGO" srvArea="" fedCommArea="" sharedArea="">
  <value type="TEFAP" estimated="0" qprId="36017.TEFAP">8544</value>
  <value type="CSFP" estimated="0" qprId="36017.CSFP">0</value>
  <value type="Donated" estimated="0" qprId="36017.Donated">5133</value>
  <value type="Purchased" estimated="0" qprId="36017.Purchased">23545</value>
  <value type="NumAgncies" estimated="0" qprId="36017.NumAgncies">16</value>
  <value type="NumMobilPantryDiv" estimated="0" qprId="36017.NumMobilPantryDiv">2</value>

```

7. If a County is included on the Report and/or XML Export and does not have a UNC Count FIPS Code associated with it, the user will receive the following message upon running the report and/or export.



To resolve this error, review the FBC County Codes list to ensure that every county listed has a UNC County FIPS Code specified.



8. The number of Mobile Pantry Drops has been added to the printed report to the right of the Agency Count field.

Pounds Distributed by County							2/6/2020 11:37 AM	
Ceres 5.0 Testing							Page 1	
Posting Date: 09/01/19..12/31/19							ESOPRO\RXF	
		TEFAP/ Bonus/Other	CSFP	Donated	Purchased	Total Pounds	Agency Count	Mobile Pantries
20091	JOHNSON, KS							
	KS-JOHNSON - Johnson Total:	0	0	0	21	21	1	0
	20091 Total:	0	0	0	21	21	1	0
20099	LABETTE, KS							
	KS-LEAVENW - Leavneworth Total:	0	0	642	417	1,059	1	14
	20099 Total:	0	0	642	417	1,059	1	14
29095	JACKSON, MO							
	MO-JACKSON - Jackson Total:	0	0	1,336	0	1,336	2	0
	29095 Total:	0	0	1,336	0	1,336	2	0
29107	LAFAYETTE, MO							
	MO-LAFAYET - Lafayette Total:	0	0	36	0	36	1	0
	29107 Total:	0	0	36	0	36	1	0
	Report Total:	0	0	2,014	438	2,452	5	14

## Related Topics

1. Agency Overview
2. Agency Order Overview
3. Blue Receipt Activity Report
4. FA Reporting and UNC Coding (QPRs\_Blue Receipts)
5. Receipts and Distribution Report with XML Export
6. QPR Import User Guide