

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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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 \rightarrow Administration \rightarrow Application Setup \rightarrow General \rightarrow Food Bank Codes \rightarrow 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.

🚮 Edit - F	BC Coun	ity					×
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	🗊 Edi	t List	C Show as	Chart	- Notes	×	
New	🗙 Del	ete			🗟 Links	A%	
New	Man	age	View		Show Attached	Page	
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T DC CC	FBC County Ceres 5.0 Testing (*) Ceres 5.0 Testing (*) Notes County Notes Notes						
		Туре	to filter (F3)	Co	de	▼ →	×
Code	*	Descri	ption	State		UNC County FIPS Code	Â
AK-AN	ICHORA	Ancho	rage	AK		01001	
AL-MA	ADISON	Madiso	on	AL		01089	Ξ
AL-MO	OBILE	Mobile		AL		01090	
AR-CR	AIGHE	Craigh	ead	AR		05031	
AZ-CC	CHISE	Cochis	e	AZ		04003	
AZ-M/	ARICOP	Marico	ра	AZ		04013	
AZ-PIN	MA	Pima		AZ		04019	
AZ-MARICOP AZ-PIMA CA-ALAMEDA		Alame	da	CA		06001	
AZ-MARICOP AZ-PIMA CA-ALAMEDA CA-CONTRA		Contra	Costa	CA		06011	
CA-FR	ESNO	Fresno		CA		06019	
CA-M	ONTERE	Monte	rey	CA		06053	
CA-OF	RANGE	Orange	2	CA		06059	
CA-PL	ACER	Placer		CA		06061	
CA-RIV	VERSI	Riversi	de	CA		06065	
CA-SA	N FRA	San Fra	incisco	CA		06075	
CA-SA	NTA B	San Ba	rbara	CA		06083	
CA-SA	NTA C	Santa (Cruz	CA		06085	
CA-SC	NOMA	Sonom	ia	CA		06097	-
						ОК	

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

General					
Address & Contact					
nvoicing					
ayments					
nformation					
Agency Express				Other	
Agency Group Code:	120		•	CMobile Related:	
Permit Web Orders:				Exclude from Compliance:	
AE Survey Online Order Status:	 Enabled		-	Location & Government	
AF Quest, Applicable Date:				Geographical Location Code:	
Cares Questionnaire Gra Cada				Metropolitan Area Code:	▼
Ceres Questionnaire Grp. Code:			•	Federal Congr. Dist. Code:	•
Survey Group Code:			•	State Congr. Dist. Code:	
Agency Type & Information				Savata District	· · ·
Service Areas:				Senate District:	
Product Sources:				City Council District:	
Funding Sources:				Ward:	
Client Records Maintained:				School District:	
UNC Food Bank ID No.:			•		
SDO:				Attribute Count:	3
Food Bank Program:		\searrow		Affiliation Count:	2
FBC Program Type:	ON-SITE FD			Tier Count:	1
FBC Size Code:	-				
Mobile Pantry:					

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



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.

🚮 Reports - Microsoft Dynam	ics NAV
🗲 🌖 🗸 🛛 Finance C	ompany ► Departments ► Financial Management ► Receivables ► Reports ►
•	
Departments Financial Management General Ledger Cash Management Cost Accounting Cash Flow Receivables Payables Fixed Assets Inventory Periodic Activities Setup Agencies & Receivables Purchasing Donation Warehouse Human Resources Roadnet Appian Adv. Leased Storage Web Portal	 Reports Agency - Order Summary Agency - Order Detail Top Agency List Agency - Distribution List Agency Labels Agency/Item Statistics Agency/Item Statistics Det/Sum Agency/Item Status Item Status by Resp. Person Dopen Agency Order Aging Outstanding Agency Order Aging Outstanding Agency Order Status Agency Invoice Nos. Agency Invoice Nos. Agency Invoice Nos. Sales Tax Area List Sales Tax Detail List Sales Tax Group List
🚹 Home	Resp. Person Commissions Resp. Person Statistics by Inv.
Reference Data	Ship-To Address Listing Projected Cash Receipts
a Journals	Distribution Pounds By County
Worksheets	Grant Summary Grant Usage
Posted Documents	Grant Status Inventory Avail. by Agency Allocated Agency Order Status
⊞ -	Allocation Broducts Order

2. This will open the request page.

Edit - Distribution Pounds By	County 🗖 🗖 💌
 ACTIONS 	Ceres 5.0 Testing ?
Clear Filter	
Page	
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 Vie	w
Show results:	
🗙 Where 🛛 Inventory	Posting Group 🔻 is 🛛 Enter a value.
🗙 And 🛛 Branch Co	ode 🔻 is 🛛 Enter a value.
🗙 And 🛛 FBC Cour	ty 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.

Γ	User Setup	Ŧ											Type to filter	(F3)	User ID			•	~
																	N	lo filters applied	
	User ID 🚽	Allow Postin	Allow Posting To	Regi Time	Responsi Person	Time She	Ove Cre	Mo Cre	Ove Acti	View We	Default Item Di	Default Locatio	Default CMobil	Ove Ite	Cha Don	Allow Adv	Allow Cre	Temp Path) '
Ľ	ESOPRO\CJW						V	V	1	V	Donor the			V	V	1	V	C:\NAVTEMP\	
L	ESOPRO\JBL	10/2/2018	4/9/2020								Donor the				V				
L	ESOPRO\RXF	12/1/2019	2/29/2020				V	V	V	V	Donor the			V	V	V	V	C:\TEMP\	F
	ESOPRO\WWH						1	1	1	1	Donor the			1	V	1	V	C:\NAVTEMP\	V
																			/

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.



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 Distr	ibuted by County					:	2/6/2020 11 Pag	:37 AM
Posting Date: 0	9 9/01/19.12/31/19						ESOPI	RO\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
		-						

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