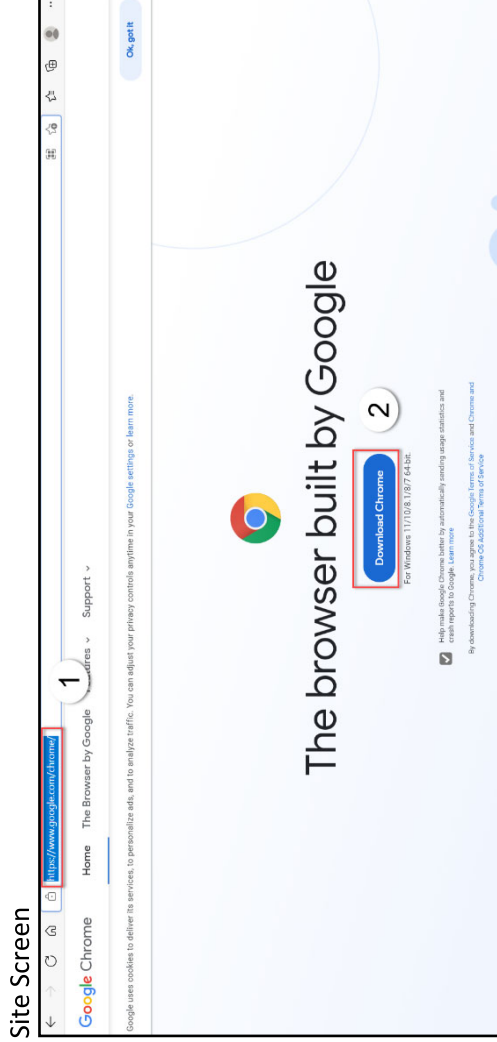




Job Aid  
**WBSCM Browser Settings and Helpful Tips**

<b>Job Aid Title</b>	<b>WBSCM Browser Settings and Helpful Tips</b>
<b>Purpose</b>	<p>The job aid describes the recommended Chrome browser settings and tips for WBSCM and associated hardware/software requirements.</p> <p>Not all Chrome browser settings or features may be available to all users. Contact your organization's IT for support.</p> <p>If there are questions or issues related to WBSCM, please email <a href="#">WBSCM ServiceDesk</a> or call 877-WBSCM-4U or 877-927-2648.</p>
<b>Target Audience</b>	All WBSCM Users
<b>Prerequisite</b>	Google Chrome browser is recommended when performing WBSCM activities. This job aid uses Chrome for example screenshots and tips.
<b>Required WBSCM Settings</b>	<p>The following actions are required for the recommended browser:</p> <ul style="list-style-type: none"><li>• <a href="#">Download and Install Chrome Browser</a> – if not already installed</li><li>• <a href="#">Confirm Chrome Browser Version</a></li><li>• Enable Pop-up Settings:<ul style="list-style-type: none"><li>○ <a href="#">All Websites</a></li><li>○ <a href="#">WBSCM Only</a></li></ul></li></ul>
<b>Helpful Tips</b>	<p>The following tips are helpful in WBSCM:</p> <ul style="list-style-type: none"><li>• <a href="#">Create and Locate WBSCM as Bookmark</a></li><li>• <a href="#">Download / Export Document from WBSCM</a></li><li>• <a href="#">Enable PDF File Download Settings</a></li><li>• <a href="#">Access Multiple WBSCM Accounts Using Incognito Window</a></li><li>• <a href="#">Delete Chrome Browsing Data</a></li><li>• Zoom Scale - default 100% (Recommended)</li><li>• Font Size - default Medium (Recommended)</li></ul>
<b>WBSCM Hardware and Software</b>	<ul style="list-style-type: none"><li>• <a href="#">WBSCM Hardware and Software Recommendation</a></li></ul>

### Chrome Download Site Screen



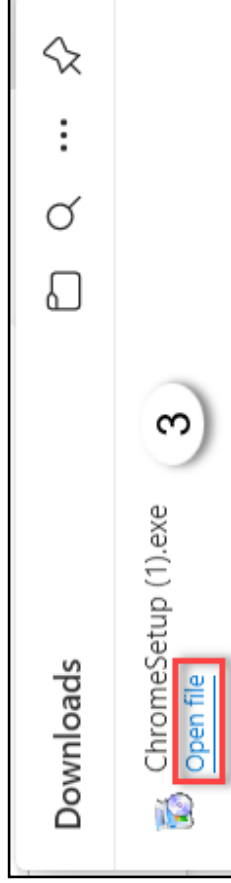
### Download and Install Chrome Browser

1. Visit <https://www.google.com/chrome/>.
2. Click **Download Chrome** (the **Download Chrome** button).
3. Click **Open file** (the **Open file** button) from the **ChromeSetup.exe** file from the downloads list.
4. If prompted, click **Install anyway** and **Yes** on the system dialogs.
5. Wait for the installation to finish.

**Note:** Chrome will open automatically when the installation is completed.

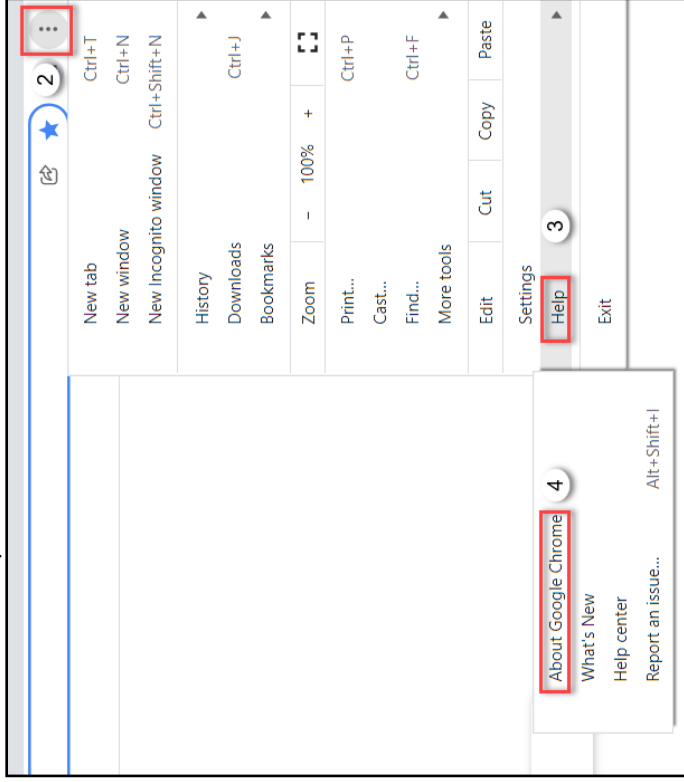
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### Install Chrome Screen

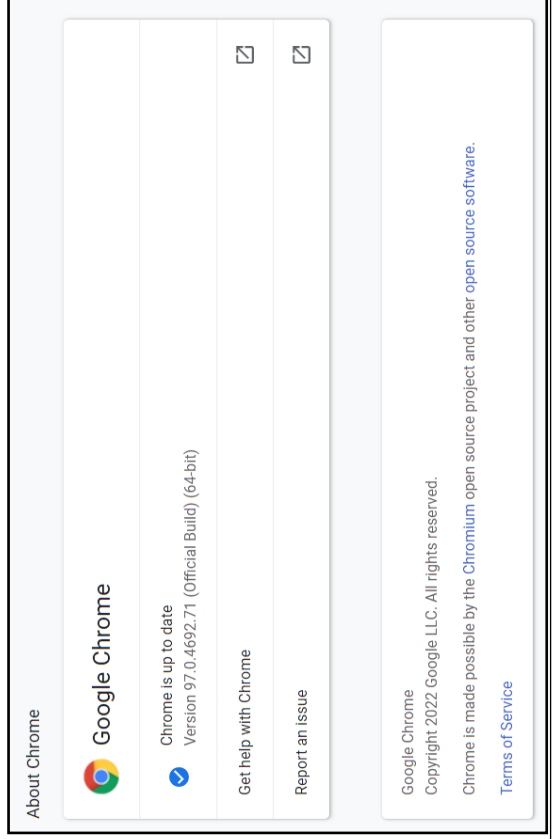


### About Chrome Selection Screen



About Chrome Steps



### About Chrome Version




### Confirm Chrome Browser Version

1. Open  (the **Chrome** browser).
2. Click  (the **Three Dots** button) on the top right corner of the screen.
3. Click **Help** (the **Help** button).
4. Click **About Google Chrome** (the **About Google Chrome** button) to review the current version and available updates.

#### Notes:

Chrome normally updates automatically in the background when the browser is closed and opened.

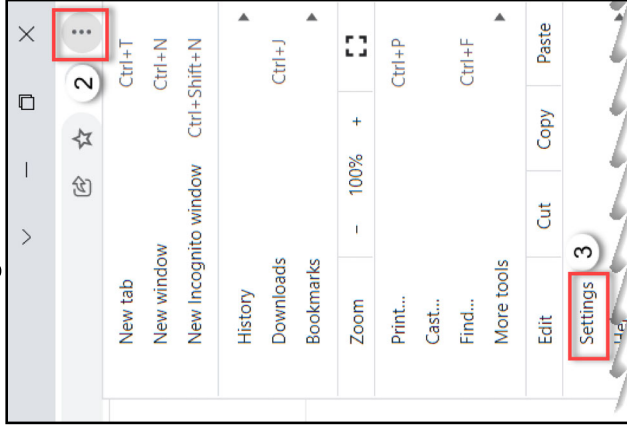
If there is a pending update, it may begin automatically or by clicking the **Update Google Chrome** link. After updating, click **Relaunch** to close the current browser and restore open tabs in the updated browser.

5. Click  (the **Close** button) to close the current window.

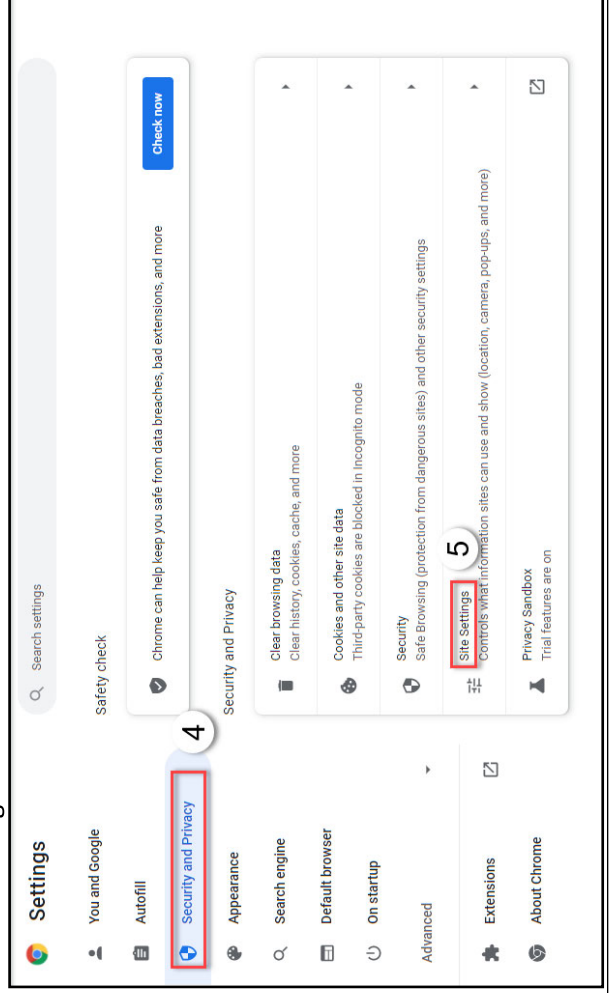
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### Chrome Pop-up Settings Menu Screen

Select Settings Screen







### Chrome Settings Screen



### Enable Pop-ups (All Websites)

To enable pop-ups for all websites, perform the following steps:

1. Open  (the **Chrome** browser).
  2. Click  (the **Three Dots** button) on the top right corner of the screen.
  3. Click **Settings** (the **Settings** button).
  4. Click  (the **Security and Privacy** button) on the left part of the screen.
-  **Site Settings**  
Controls what information (the **Site Settings** button).
5. Click

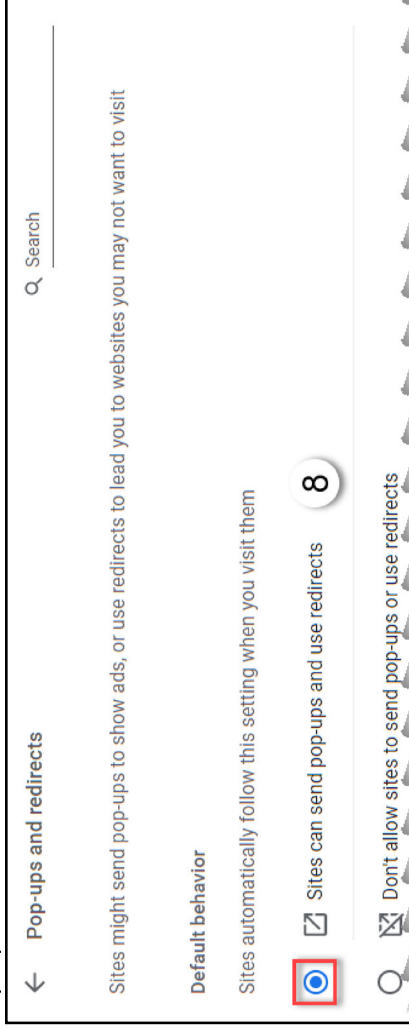
[Back to top](#)

### Chrome Pop-up Settings Menu Screen

#### Pop-ups and Redirects Option Screen





#### Pop-ups and Redirects Selection Screen



### Enable Pop-ups (All Websites) (continued)

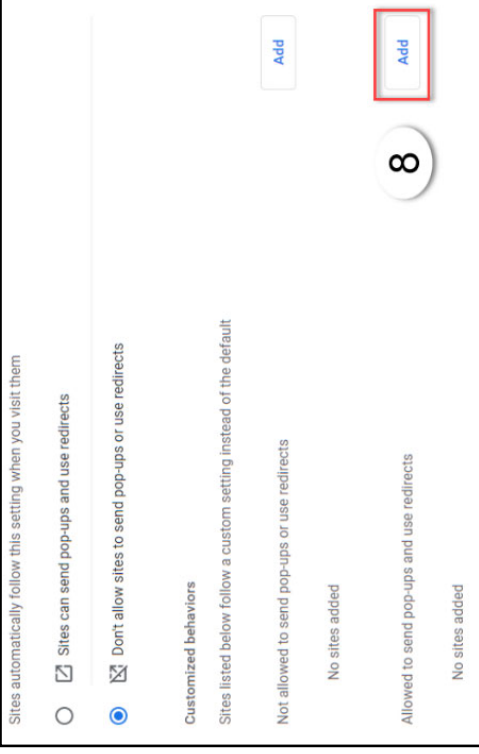
To enable pop-ups for all websites, perform the following steps:

6. If necessary, click  (the **Drop-down** arrow) on the bottom right corner, to view additional options.  
 Pop-ups and redirects  
Don't allow sites to send pop-ups or use redirects (the
7. Click **Pop-ups and redirects** button).
8. Click  (the **Sites can send pop-ups and use redirects** radio button) to enable pop-ups for all websites.

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### Chrome Pop-up Settings Menu Screen

#### Chrome Pop-ups and Redirects Screen



Sites automatically follow this setting when you visit them

Sites can send pop-ups and use redirects

Don't allow sites to send pop-ups or use redirects

Customized behaviors

Sites listed below follow a custom setting instead of the default

Not allowed to send pop-ups or use redirects

No sites added

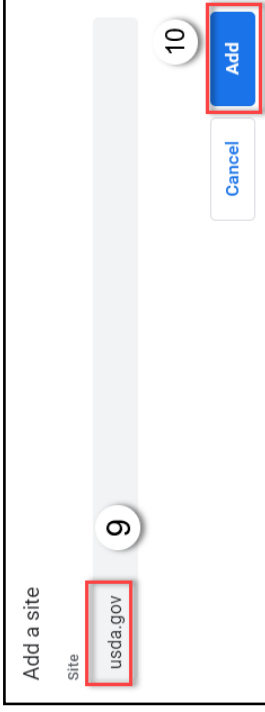
Allowed to send pop-ups and use redirects

No sites added

8

Add

#### Add a Site Screen



Add a site

Site

usda.gov

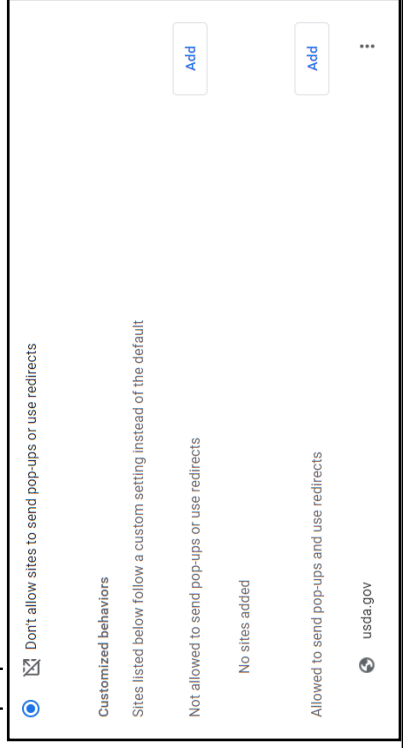
9

10

Cancel

Add

#### Pop-ups and Redirects with WBSM Screen



Don't allow sites to send pop-ups or use redirects

Customized behaviors

Sites listed below follow a custom setting instead of the default

Not allowed to send pop-ups or use redirects

No sites added

Allowed to send pop-ups and use redirects

usda.gov










Add

Add

:

### Enable Pop-ups (WBSM only)

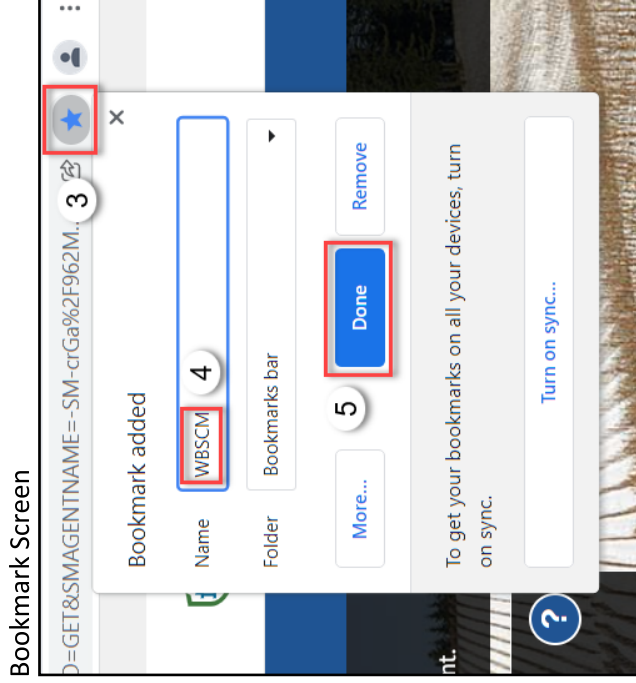
To enable pop-ups for the WBSM website only, perform the following steps:

1. Open  (the **Chrome** browser).
2. Click  (the **Three Dots** button) on the top right corner of the screen.
3. Click **Settings** (the **Settings** button).
4. Click  (the **Security and Privacy** button) on the left part of the screen.
5. Click  **Site Settings** **Controls what information** (the **Site Settings** button).
6. If necessary, click  (the **Drop-down** arrow) on the bottom right corner, to view additional options.
7. Click  **Pop-ups and redirects** **Don't allow sites to send pop-ups or use redirects** (the **Pop-ups and redirects** button).
8. Click  (the **Add** button) next to the *Allowed to send pop-ups and use redirects* section.
9. On the *Add a Site* screen, enter **usda.gov** in the **Site** field.
10. Click  (the **Add** button).
11. Click  (the **Close** button) to close the current window.

**Note:** Screens for steps 1 to 7 are displayed in the **Enable Pop-ups (All Websites)** section of the job aid.




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### Chrome Bookmark Screen

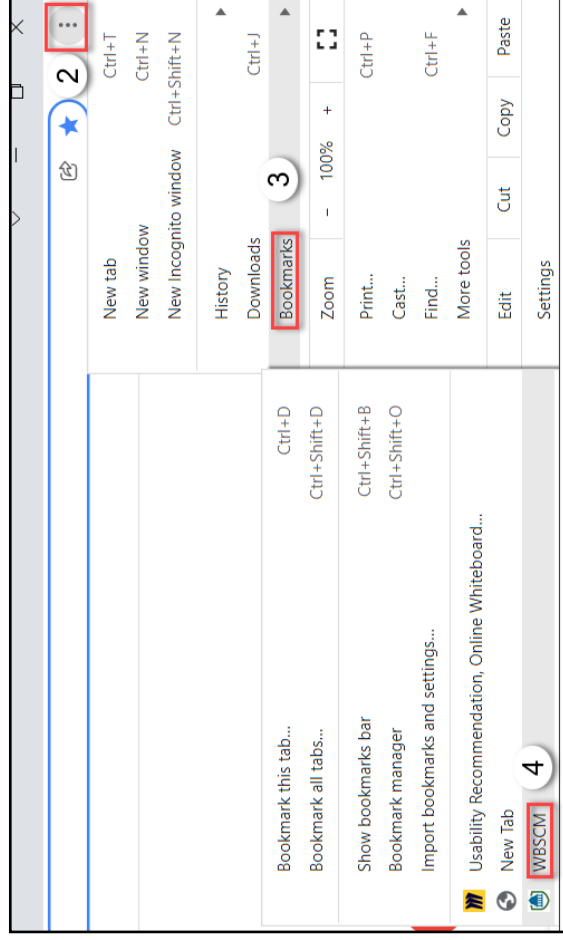


### Create and Locate WBSCM Bookmark in Chrome



Create WBSCM Bookmark:

1. Open  (the **Chrome** browser).
2. Navigate to the webpage that requires a bookmark such as:  
WBSCM Production Portal - <https://portal.wbscm.usda.gov>  
WBSCM Training Site - <https://wbscmtrn.wbscm.usda.gov>
3. Click  (the **Star** button) to add a bookmark.
4. In the *Bookmark added* pop-up, enter a **Name** for the bookmark.  
In this example, **WBSCM** is entered.  
**Note:** It may be helpful to use more distinctive names if using multiple versions of WBSCM: **WBSCM – Production** and **WBSCM – Training**.
5. Click  (the **Done** button) to save the bookmark.

### Chrome Bookmarks Menu Screen

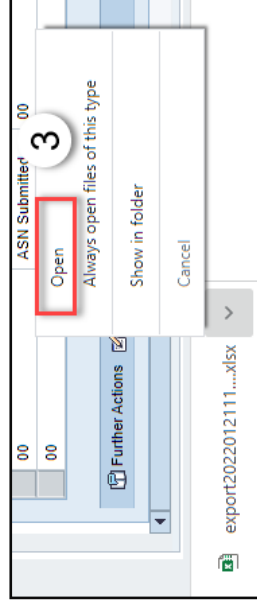
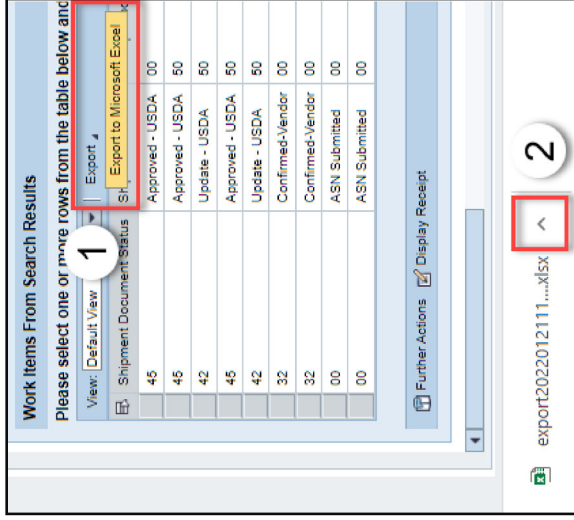


Locate WBSCM Bookmark:

1. Open  (the **Chrome** browser).
2. Click  (the **Three Dots** button) on the top right corner of the screen.
3. Click **Bookmarks** (the **Bookmarks** button).
4. Click the appropriate bookmark to open the webpage.  
In this example, **WBSCM** is selected.

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### WBSCM Document Download Screen





### Download / Export Document from WBSCM

To download or export a document, navigate to the appropriate WBSCM transaction. In this example, the **e-Invoices for Processing** transaction is selected.

1. Click the download button. The button name will vary based on the transaction.  
In this example, click  (the **Export** button) and select **Export to Microsoft Excel** from the drop-down.

**Note:** A file download prompt displays at the bottom of the screen for all document types except PDF files.

2. Click  (the **Arrow** button) to display a list of options.
3. Click  (the **Open** option).

**Note:** The user can select the **Always open files of this type** option to set as the default option.

**Note:** The file opens in a new window. Return to the browser to continue using WBSCM.

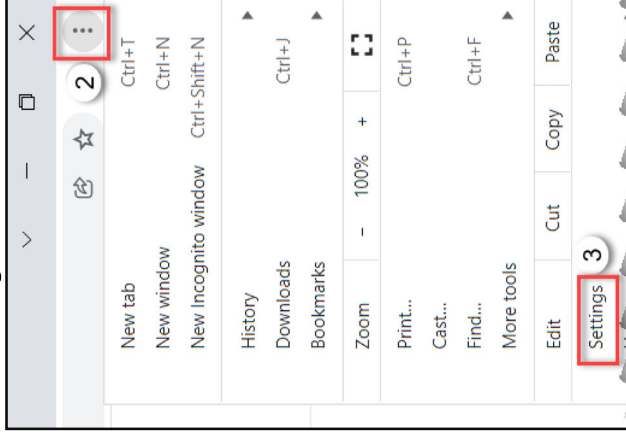
**Note:** PDF documents automatically open on a browser preview tab by default in Chrome. The user may update their browser settings to [enable PDF file downloads](#) and change the default PDF viewer.

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### Chrome PDF File Download Settings Screen

#### Select Settings Screen







#### Chrome Settings Screen



### Enable PDF File Download Settings

Chrome PDF settings default to open documents automatically.

Alternatively, the browser settings can be updated to download PDF. Perform the following steps:

1. Open  (the **Chrome** browser).
2. Click  (the **Three Dots** button) on the top right corner of the screen.
3. Click **Settings** (the **Settings** button).
4. Click  **Security and Privacy** (the **Security and Privacy** button) on the left part of the screen.
5. Click  **Site Settings** **Controls what information** (the **Site Settings** button)

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### Chrome PDF File Download Settings Screen

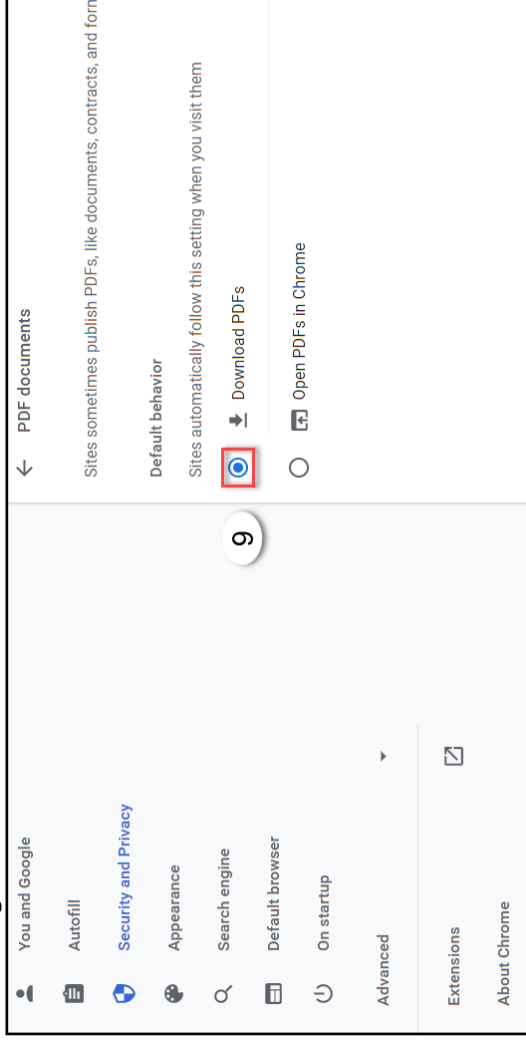
#### Additional Content Settings




#### PDF Document



#### PDF Settings Screen

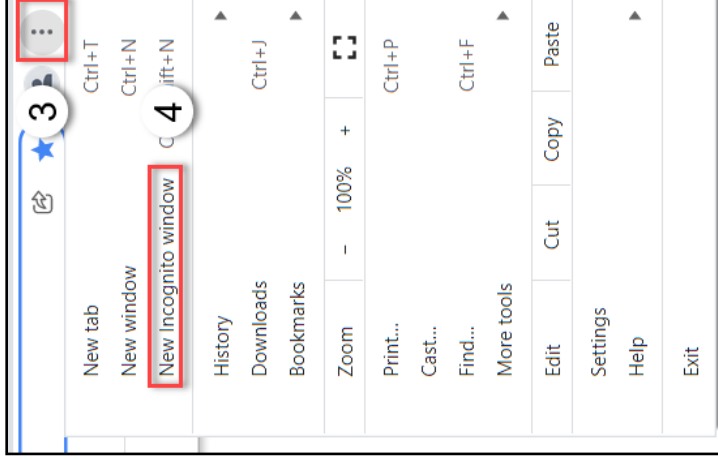


### Enable PDF File Download Settings (continued)

6. If necessary, click  (the **Drop-down** arrow) on the bottom right corner, to view additional options.
7. Click  **Additional content settings** (the **Additional content settings** button).
8. Click  **PDF documents** (the **PDF documents** button).
9. Click  (the **Download PDFs** radio button).
10. Click  (the **Close** button) to close the current window.




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### WBSCM Incognito Screen



### Access Multiple WBSCM Accounts Using Incognito Window

Chrome does not support multiple logins to a site at the same time. If a user needs to access two different WBSCM accounts concurrently, they can use a regular Chrome session as well as an incognito window by performing the following steps:

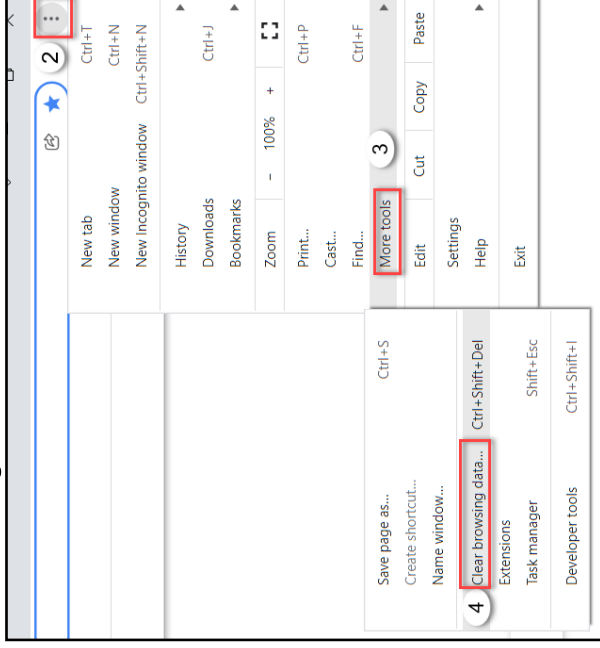
1. Open  (the **Chrome** browser).
2. Navigate to <https://portal.wbscm.usda.gov/> and enter credentials.  
**Note:** The user is logged into WBSCM with the first account.
3. Click  (the **Three Dots** button) on the top right corner of the screen.
4. Click **New Incognito window** (the **New Incognito window** button).
5. Navigate to <https://portal.wbscm.usda.gov/> and enter the second set of credentials.  
**Note:** The user is logged into WBSCM with the second account.
6. Click  (the **Close** button) to close the windows as necessary.

**Note:** All data and history of the incognito page will be automatically deleted once the page is exited.

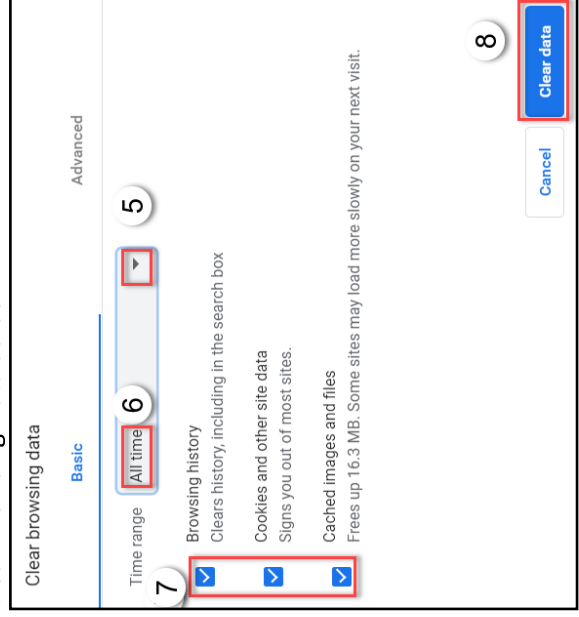
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### Delete Browsing Data Screen

#### Clear Browsing Data








#### Clear Browsing Data Screen



### Delete Chrome Browsing Data to Resolve Issues

To resolve browser issues, the user can delete browsing data; this includes, browsing history, cookies and other site data, as well as cached images and files.

1. Open  (the **Chrome** browser).
2. Click  (the **Three Dots** button) on the top right corner of the screen.
3. Click **More tools** (the **More tools** button).
4. Click **Clear browsing data...** (the **Clear browsing data...** button).
5. In the *Clear browsing data* pop-up, click  (the **Drop-down** arrow) next to the **Time range** field.
6. Always select the **All time** option from the list.
7. Ensure that each  (the **Checkbox**) next to **Browsing history**, **Cookies and other site data**, and **Cached images and files** is checked.  
**Note:** If  (the **Checkbox**) next to any of the fields is not automatically selected, click on it to select.
8. Click  (the **Clear data** button).
9. Click  (the **Close** button) to close the current window.

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Job Aid  
**WBSCM Browser Settings and Helpful Tips**

**WBSCM Hardware and Software Recommendations**

<b>Hardware</b>	<b>Minimum Required</b>	<b>Recommended</b>
<b>Processor</b>	1 GHz	Dual Core 2 GHz
<b>Memory</b>	2 GB	4 GB
<b>Video Card</b>	8 MB Video card with 16 million colors at 1024 x 768 resolution	16 MB Video card with 16 million colors at 1024 x 768 resolution
<b>Monitor</b>	Color SVGA monitor and display adapter, 1024 x 768 resolution, 16 million colors	Color SVGA monitor and display adapter, 1024 x 768 resolution, 16 million colors

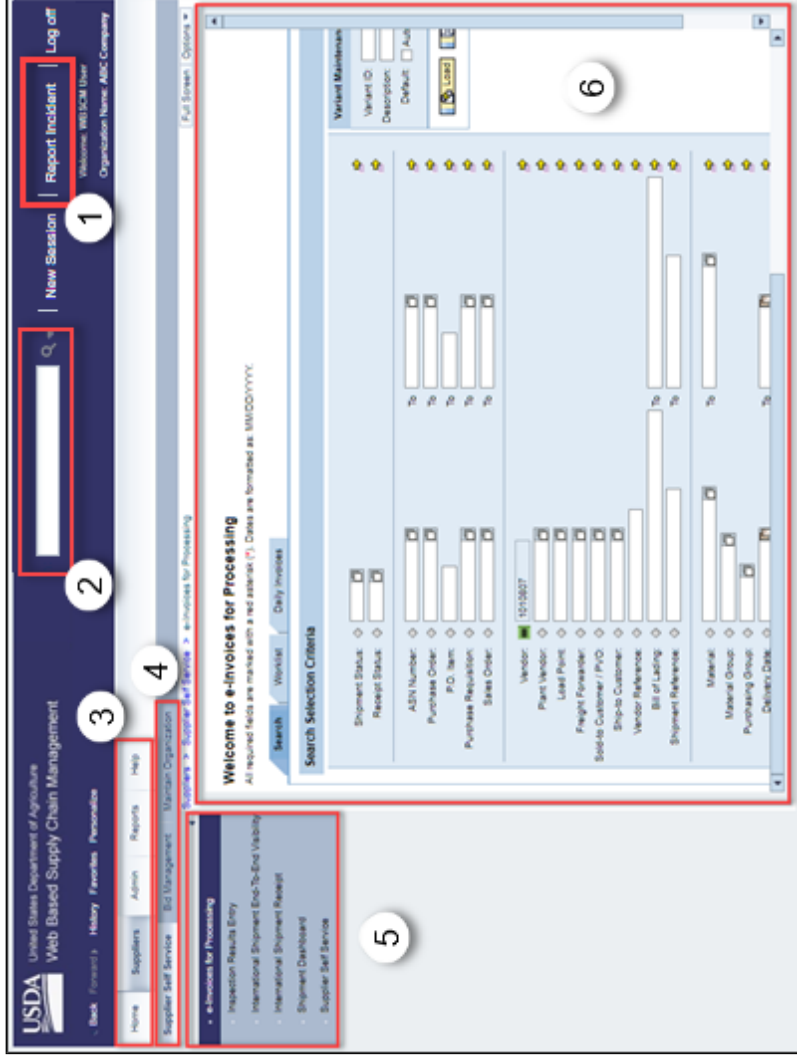
<b>Software</b>	<b>Manufacturer</b>	<b>Version</b>
Operating System	Microsoft	Microsoft Windows 8.1 – 32 or 64 bit Microsoft Windows 10 – 32 or 64 bit
Browser	Google	Chrome (latest version)
PDF Reader	Adobe	Adobe Acrobat Reader DC (latest version)
Office (Word, Excel)	Microsoft	Office 2013 or higher



	<p><b>WBSCM Portal Navigation</b></p> <p>This job aid reviews advanced WBSCM Portal navigation. Refer to the <a href="#">WBSCM Portal Navigation</a> video for basic WBSCM Portal navigation.</p> <p>This job aid reviews:</p> <ul style="list-style-type: none"><li>• <a href="#">WBSCM Portal Screen Components</a><ul style="list-style-type: none"><li>○ <a href="#">Access a Transaction via the Detailed Navigation Panel</a></li><li>○ <a href="#">Access a Transaction via the Search the Portal Field</a></li></ul></li><li>• <a href="#">Navigate within a Transaction</a><ul style="list-style-type: none"><li>○ <a href="#">Matchcode Searches</a></li><li>○ <a href="#">Matchcodes with a Large List of Values</a></li><li>○ <a href="#">Search Using Attributes</a></li><li>○ <a href="#">Multiple Selection Criteria Searches</a></li><li>○ <a href="#">Create a Variant</a></li><li>○ <a href="#">Load a Variant</a></li></ul></li><li>• <a href="#">Transaction Output</a><ul style="list-style-type: none"><li>○ <a href="#">Sort Columns</a></li><li>○ <a href="#">Sort Multiple Columns</a></li><li>○ <a href="#">Add / Remove Columns</a></li><li>○ <a href="#">Move Columns</a></li><li>○ <a href="#">Perform Calculations</a></li><li>○ <a href="#">Save a View</a></li><li>○ <a href="#">Apply a Saved View</a></li><li>○ <a href="#">Upload Document</a></li><li>○ <a href="#">Download / Export Document</a></li></ul></li><li>• <a href="#">WBSCM Help Options</a></li></ul>
<p><b>Target Audience</b></p>	<p>All WBSCM Users</p>
<p><b>Access WBSCM</b></p>	<p>WBSCM is accessed via web browser. The WBSCM recommended browser is Chrome.</p> <p>To access WBSCM:</p> <ol style="list-style-type: none"><li>1. Open the web browser.</li><li>2. Enter the URL: <a href="https://portal.wbscm.usda.gov">https://portal.wbscm.usda.gov</a></li><li>3. Follow the prompts to login via USDA eAuthentication.</li></ol>



### WBSCM Portal Screen



### WBSCM Portal Screen Components

The components of the WBSCM Portal Screen are:

1. **Report Incident link:** Log incidents with the service desk.
2. **Search the Portal field:** Search for transactions instead of using the *Detailed Navigation Panel*.
3. **Level 1 Module Tabs:** Located directly below the Portal header, these provide the highest level of navigation. The tabs available depend on the user's security roles in WBSCM. The Level 1 *Home* tab is automatically selected upon logging in.
4. **Level 2 Tabs:** Located directly below the Level 1 tabs, these correspond to the Level 1 tab selection and user's security roles in WBSCM. The Level 2 *News and Alerts* tab is automatically selected upon login.
5. **Detailed Navigation Panel:** This section houses WBSCM transactions. Contents of this menu are dependent on the Level 2 tab selection and the user's security roles in WBSCM.

**Note:** The *WBSCM Portal Home* Screen defaults with the *Detailed Navigation Panel* displayed. Users may adjust the amount of screen area used:

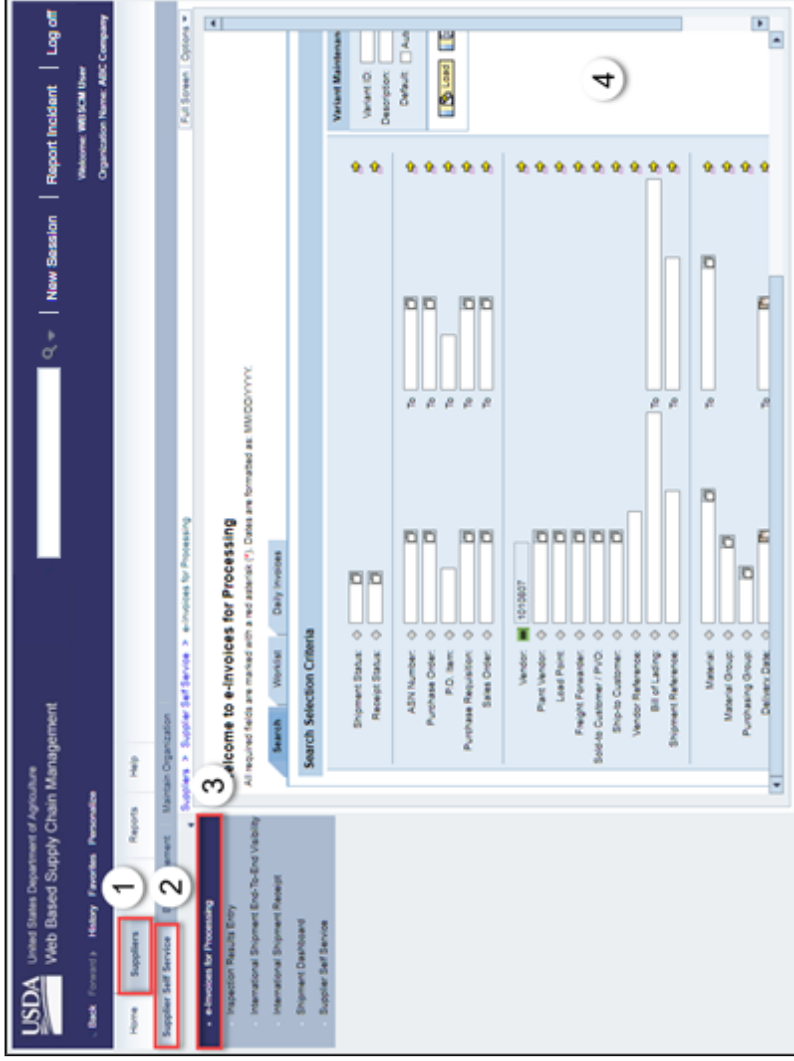
- Click (the **Collapse Detailed Navigation Panel** button) to collapse the *Detailed Navigation Panel*.
- Click (the **Expand Detailed Navigation Panel** button) to expand it.

6. **Content Area:** This area is used to enter or view details and execute transactions.

**Note:** To maximize the size of the Content Area, click (the **Hide Navigator** button) to hide the Navigation Panel and/or click (the **Full Screen** button).



### WBSM Detailed Navigation Panel



### Access a Transaction via the Detailed Navigation Panel

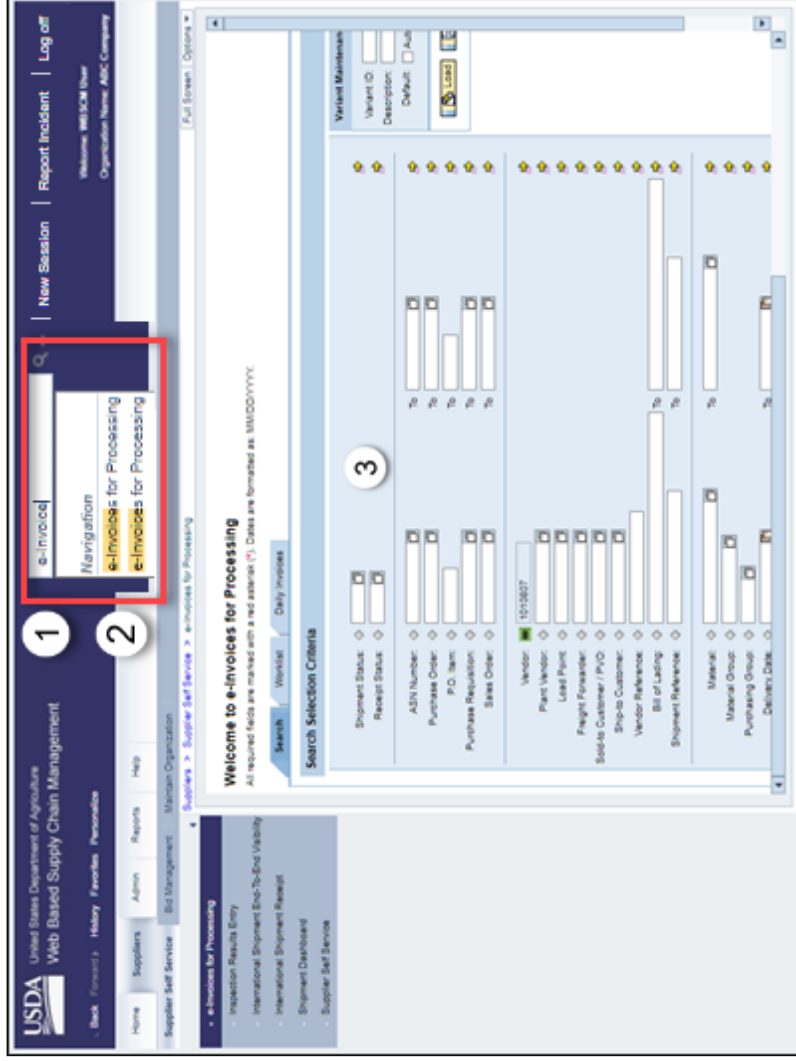
Transactions are used to perform a specific activity in WBSM. Transactions are accessed by selecting the transaction from the *Detailed Navigation Panel*.

1. Select the Level 1 module tab for the required transaction.
2. Select the Level 2 tab for the required transaction.
3. Select the transaction from the *Detailed Navigation Panel*.
4. The initial screen of the transaction displays in the *Content Area*.

**Tip:** Frequently used transactions can be saved to the user's personal favorites list. Refer to the [WBSM Portal Favorites](#) job aid for more information.



## WBSCM Search the Portal Field Screen



## Access a Transaction via the Search the Portal Field

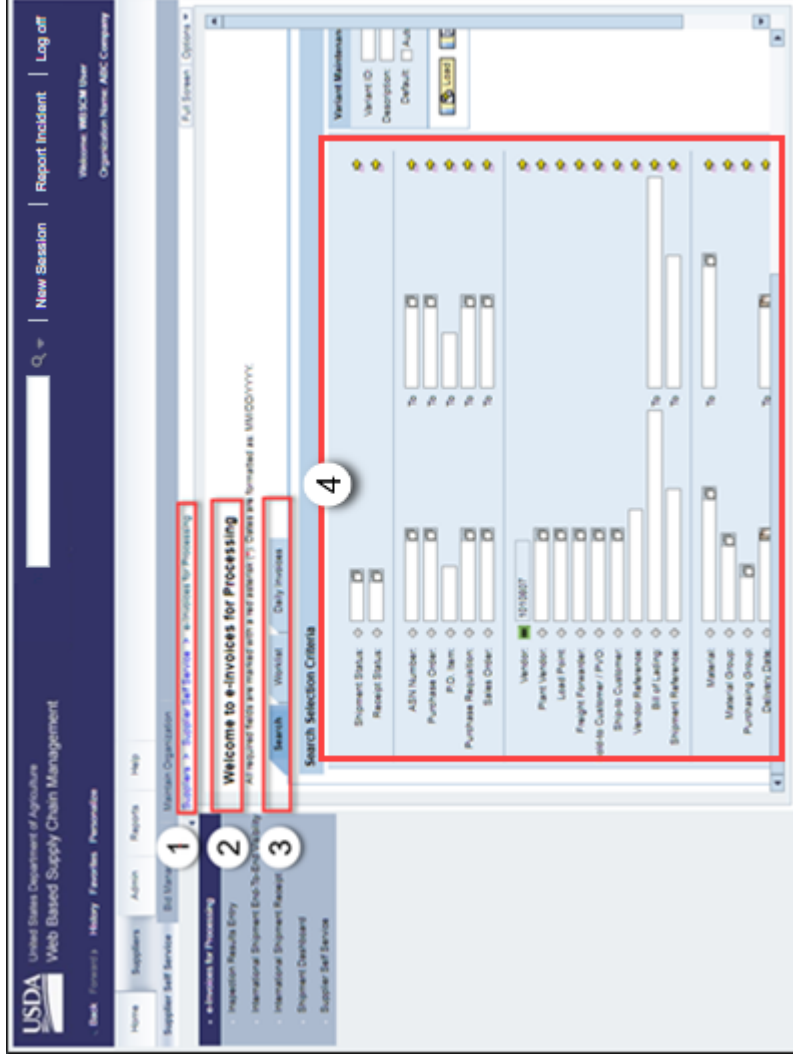
When the exact path to a transaction is not known, users may perform a search, which provides direct access to the transaction.

1. Enter a keyword or phrase in the **Search the Portal** field.
2. As characters are entered, a list of matching transactions displays. Select the transaction from the drop-down list.
3. The initial screen of the transaction displays in the *Content Area*.

In this example, the *e-Invoices for Processing* screen displays.

**Tip:** Frequently used transactions can be saved to the user's personal favorites list. Refer to the [WBSCM Portal Favorites](#) job aid for information.

## WBSCM Transaction Screen



## Navigate within a Transaction

1. **Transaction Navigation Path:** Displays above the *Content Area*.
2. **Transaction Name:** Displays at the top of the *Content Area*.

In this example, the *e-Invoices for Processing* screen displays.

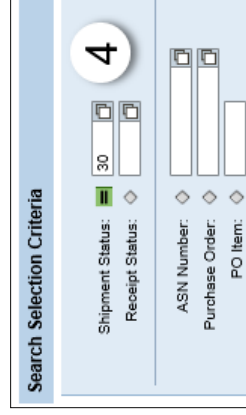
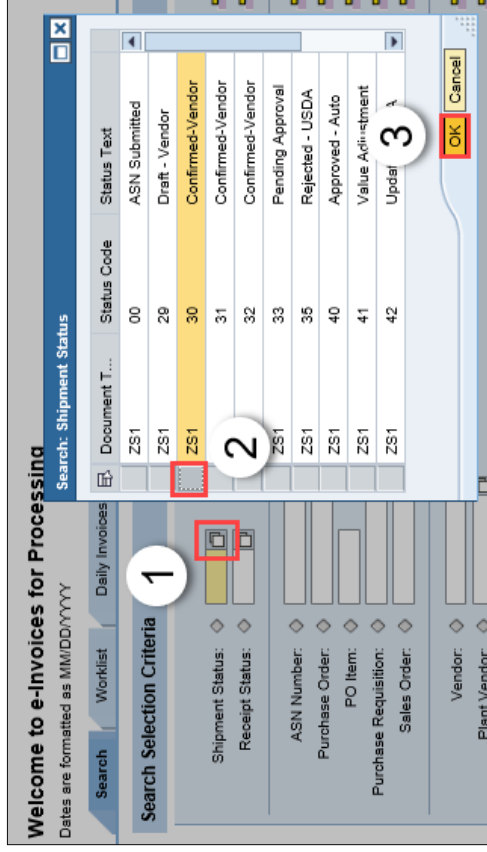
3. **Screen Tabs:** Contain one or more sub-screens.

**Note:** Sub-screen tabs are transaction dependent and do not appear for all screens.

4. **Content Area:** Includes data entry and informational fields. There are three types of data entry fields:
  - a. **Optional fields:** Fields that may be completed at the user's discretion or needed in a business process. Some transactions contain many optional fields and may be executed with any combination of known data in the available fields.
  - b. **Default Data fields:** Fields that are prepopulated with data. The information in these fields is determined by WBSCM and cannot be changed.
  - c. **Required fields:** Fields that must be completed to proceed with the transaction. Required fields are marked by an \* before the field name.




**Note:** When entering search criteria, users should complete as many data entry fields as possible to limit the number of matching results. In some cases, there are additional tabs to review or update.

## Matchcode Search Screen



## Matchcode Searches

Matchcodes, also called a drop-down menu, allow the user to select from a list of possible values or to narrow a list of values to the required selection.

1. Select  (the **Matchcode** button) to display a list of possible values.  
In this example, the user selects a value for the **Shipment Status** field.
2. Click  (the **Select** button) to the left of the correct value.
3. Click  (the **OK** button) to accept the selection.
4. The field is populated with the selected value.

**Note:** The user may select multiple values by holding the **CTRL** key and clicking  (the **Select** button) for each of the required lines.

## Matchcode Search Screen

1

Material:

Material Group:

Purchasing Group:

Delivery Date:

P.O. Required Date:

Search: Material

Personal Value List Hide Search Criteria

Search Criteria

2a Search Helps: Material Number/Material Description 2b

Material description contains BEEF

Language Key is EN

Material is

3 Search Entries Reset to Default

Maximum Number of Results: 500

Results List: 55 results found for Material

Description	Language	Material
BABY FOOD BEEF JAR-12/4 OZ	EN	900015
BEEF 100% PATTY FRZ CTN-40 LB	EN	100161
BEEF 100% PTY 85/15 FRZ 1.5MMA CTN-40 LB	EN	110350
BEEF 100% PTY 85/15 FRZ 2.0MMA CTN-40 LB	EN	110349
BEEF 100% PTY 90/10 FRZ 2.0MMA CTN-40 LB	EN	110346
BEEF BNLS SPECIAL TRM FRZ CTN-60 LB	EN	100156
BEEF BRD PATTY CKD PKG 4/10 LB	EN	100168
BEEF BRD PATTY CKD PKG-4/10 LB	EN	100132
BEEF CAN-24/24 OZ	EN	100127

4

5

Material:

Material Group:

Purchasing Group:

Delivery Date:

P.O. Required Date:

## Matchcodes with a Large List of Values

For a long list of matchcode values, WBSCM prompts the user to further define the search criteria.

1. Select  (the **Matchcode** button) to display the *Search* window.


In this example, the **Material** field match code is selected.

2. Enter search criteria for the matchcode list:
  - a. Select the search option from the drop-down in the first column.
 

In this example, **Material description** is selected.
  - b. Select a match type in the second column.
 

In this example, **contains** is selected.
  - c. Enter the search criteria in the third column.
 

In this example, **BEEF** is entered.

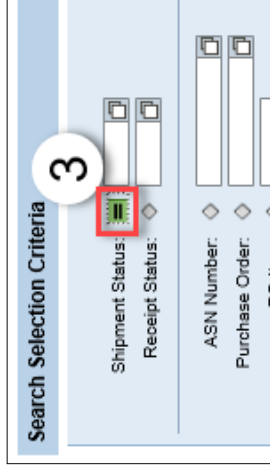
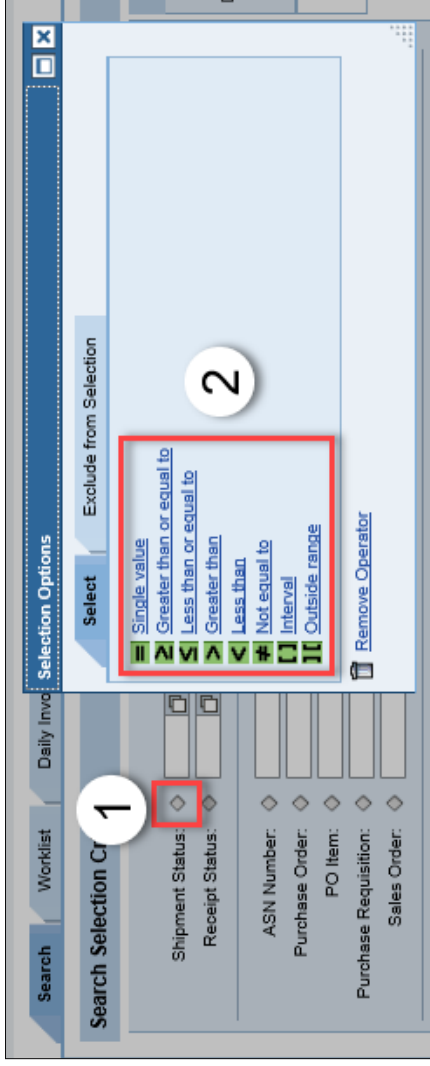
3. Click  (the **Search** button) to display a list of possible values.

4. Click  (the **Select** button) to the left of the correct value.

In this example, **BABY FOOD BEEF JAR 12/4 OZ** (Material # 900015) is selected.

5. The **Material** field is populated with the selected value.

### Input Criteria Screen



### Search Using Attributes

By default, WBSCM will return records based on either a single value match or a range if beginning and ending values are entered (e.g., dates). Use **Attribute** (the **Attribute** button) to choose how to select records based on the entered value.

To change the selection option:

1. Click **Attribute** (the **Attribute** button) to the left of a field to open the *Selection Options* window. The window defaults to the *Select* tab.
2. Click the hyperlink of the required selection option.

In this example,  (the **Single Value** option) is selected to find records equal to the entered value for the **Shipment Status** field.

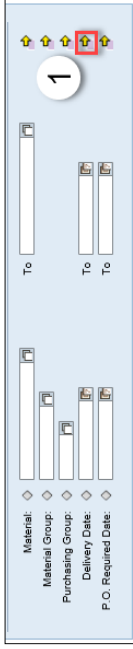
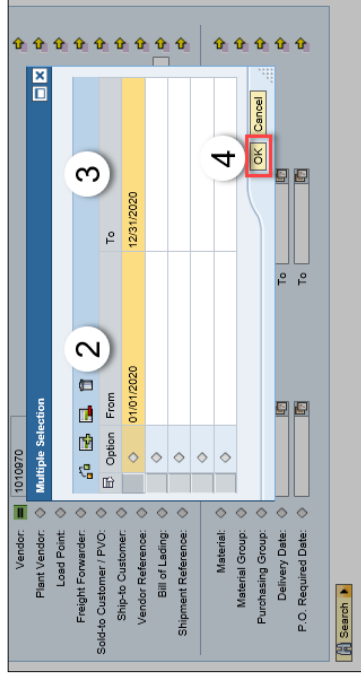
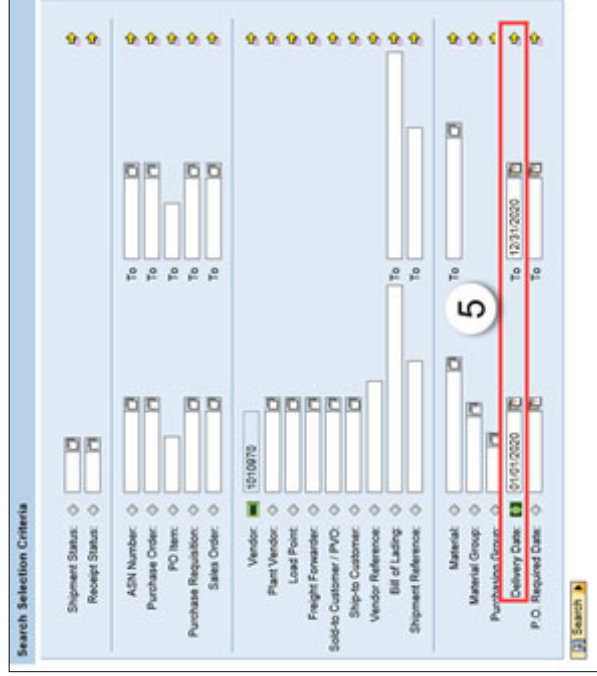
**Note:** Select  (the **Delete Selection** option) to clear the selection option from the field.

3. The selection option is displayed next to the field.

In this example,  (the **Single Value** option) displays next to the **Shipment Status** field.



**Note:** Alternatively, the user can search by identifying which values not to include by entering values on the *Exclude from Selection* tab.

### Input Criteria Screen

### Multiple Selection Criteria

Users can enter multiple discrete values, ranges, or a combination of values by using Advanced Options. Ranges are entered in a from/to format. Users may also specify non-consecutive ranges or exclude values using this option. This example uses a consecutive range.

1. Click  (the **Advanced Options** button) to open the *Multiple Selection* window.  
In this example, Advanced Options is selected for the **Delivery Date** field.
2. Enter the beginning (low) value for the range in the **From** field.  
In this example, **01/01/2020** is entered.
3. Enter the ending (high) value for the range in the **To** field.  
In this example, **12/31/2020** is entered.
4. Click **OK** (the **OK** button) to return to the input screen.
5. Review the search criteria. Unless a range is specified, fields with multiple selection criteria are indicated by  (the **Advanced Options** button).

In this example, the **Delivery Date** field is populated with a range of dates entered in the *Multiple Selection* window.

**Note:** The operator symbol for the Attribute is updated based on the first line of the Multiple Selection. This is usually  (the **Equal to** icon) for discrete values or  (the **Between** icon) for intervals.



### Input Criteria Screen

Search Selection Criteria

Shipment Status:

Receipt Status:

ASN Number:

Purchase Order:

PO Item:

Purchase Requisition:

Sales Order:

Vendor:

Plant Vendor:

Load Point:

Freight Forwarder:

Variant Maintenance

Variant ID:

Description:

Default:  Auto-Load this Variant by Default

The variant QUARTER END was successfully saved.

Welcome to e-In 4's for Processing

sites are formatted as MM/DD/YYYY

Search Worklist Daily Invoices


Search Selection Criteria

Shipment Status:

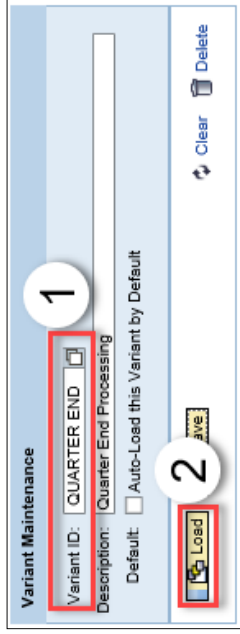
### Create a Variant

Users can save frequently used search criteria as variants.

**Note:** Some screens automatically display the *Variant Maintenance* section. If not displayed, select the **Show Variants** link first.

1. Enter applicable search criteria in the input screen.
2. Enter the unique name and description for this set of search criteria in the **Variant** field and **Description** field, respectively.
3. Click  (the **Save** button) to save the variant.
4. WBSCM displays a message *"The variant XYZ was successfully saved."* where XYZ represents the variant name.

### Input Criteria Screen

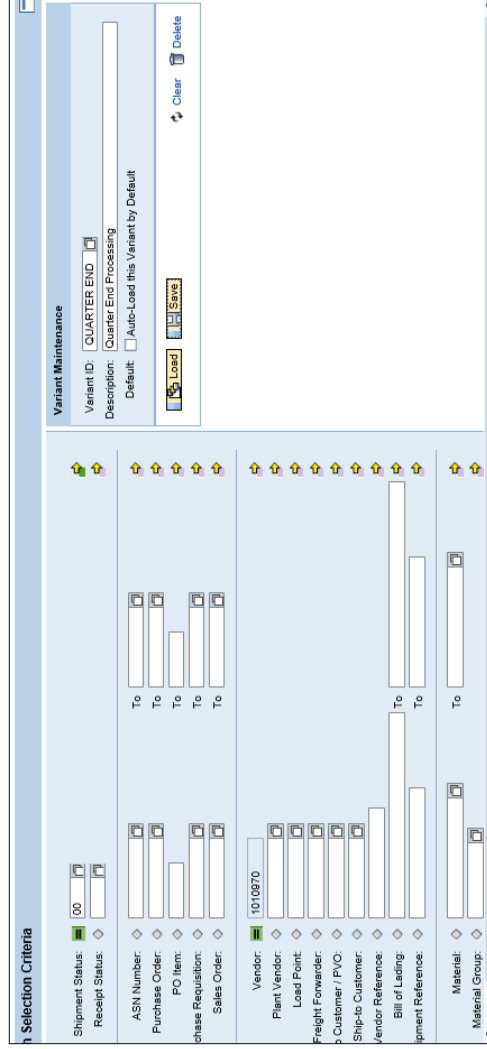


**Variant Maintenance**

Variant ID:

Description:

Default:  Auto-Load this Variant by Default



**Selection Criteria**

Shipment Status:

Receipt Status:

ASN Number:

Purchase Order:

PO Item:

Phase Requisition:

Sales Order:

Vendor:

Plant/Vendor:

Load Point:

Freight Forwarder:

Customer / PVO:

Ship-to Customer:

Vendor Reference:

Bill of Lading:


Shipment Reference:

Material:

Material Group:

### Load a Variant

**Note:** Some screens automatically display the *Variant Maintenance* section. If not displayed, select the **Show Variants** link first.

1. Search for available variants using keywords by using  (the **Matchcode** button) in the **Variant ID** field. Refer to the [Matchcode Searches](#) section for more information.

**Note:** If the exact variant name is known, the user may enter it directly in the **Variant ID** field. The **Description** field is automatically populated based upon the selected variant.

2. Click  (the **Load Variant** button) to apply the saved search criteria from the variant.





### Transaction Output Screen

**Welcome to e-Invoices for Processing**  
Dates are formatted as MM/DD/YYYY

Worklist    Daily Invoices

Search

Work Items From Search Results  
Please select one or more rows from the table below and navigate to the appropriate task button to continue

View: [Default View]    2

Shipment Document Status	Shipment Status	Receipt Document Status	Receipt Status	Purchase Order #	PO Item #	Means of Transport	Bill of Lading	Shipment Reference	Inspector
33	Pending Approval	3	GR in Process	4100007870	1	Truck	R1	E1	
40	Approved - Auto	50	GR Posted		2	Truck	R1	E1	
33	Pending Approval	25	Invoiced		3	Truck	R2	E2	
40	Approved - Auto	50	GR Posted		4	Truck	R1	E1	
40	Approved - Auto	50	Invoiced		5	Truck	R2	E2	
40	Approved - Auto	50	Invoiced		6	Truck	R1	E1	
40	Approved - Auto	50	Invoiced		7	Truck	R2	E2	
33	Pending Approval	25	GR Posted			Truck	AS		

Further Actions    Display Receipt

5

### Transaction Output

The transaction output screen displays the results based on the data entered on the input screen and the transaction performed.

**Note:** On screens with a tabular view, the output data displays on a different tab. For example, in the **e-Invoices for Processing** transaction, results are displayed on the *Worklist* tab. Not all screens include a tabular view.

The standard features of the output screen may include:

1. **Screen Name:** The name of the transaction.
2. **View:** The data layout applied to the output. The user may select the drop-down to change the view. Refer to the [Apply a Saved View](#) section for more information.

One or more view options are available for each transaction. These may include:

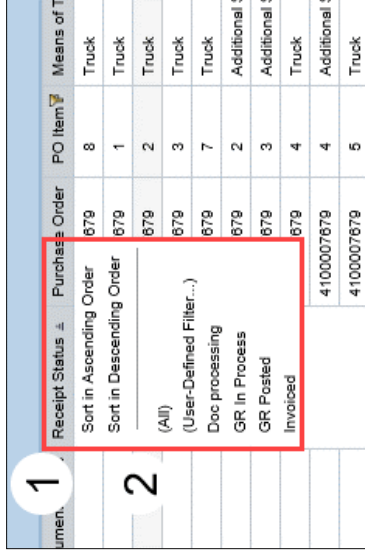
- **Standard View:** List of all fields that are available
- **Default View:** Subset of most relevant fields
- **Other system views:** Subset of fields and display layout for common purpose for specific report and/or user group. Multiple system views may be available for a given table.

3. **Column Headers:** Correspond to field names.

4. **Records:** Displayed as individual rows, with values for each field entered in the applicable columns.

5. **Scroll Bar:** Use to scroll left and right within the output screen to view additional data.

### Transaction Output Screen



Receipt Status	Purchase Order	PO Item	Means of T
Sort in Ascending Order	879	8	Truck
Sort in Descending Order	879	1	Truck
(All)	879	2	Truck
(User-Defined Filter...)	879	3	Truck
Doc processing	879	7	Truck
GR in Process	879	2	Additional
GR Posted	879	3	Additional
Invoiced	879	4	Truck
	4100007879	4	Additional
	4100007879	5	Truck

### Sort Columns

When output is displayed in columns, they can be sorted and filtered to organize information.

1. Click on the column header to open a drop-down selection window.
2. Select from the available choices:
  - **Sort in Ascending Order:** Sorts from smallest to largest number or alphabetically (A to Z).
  - **Sort in Descending Order:** Sorts from largest to smallest number or in reverse alphabetical order (Z to A).
  - **All:** Displays all available data for the column.
  - **User-Defined Filter:** Opens the *Select Filter* window, which allows the user to define sort parameters.
  - **Single Value:** Sorts the results to only display the value chosen from the drop-down menu.

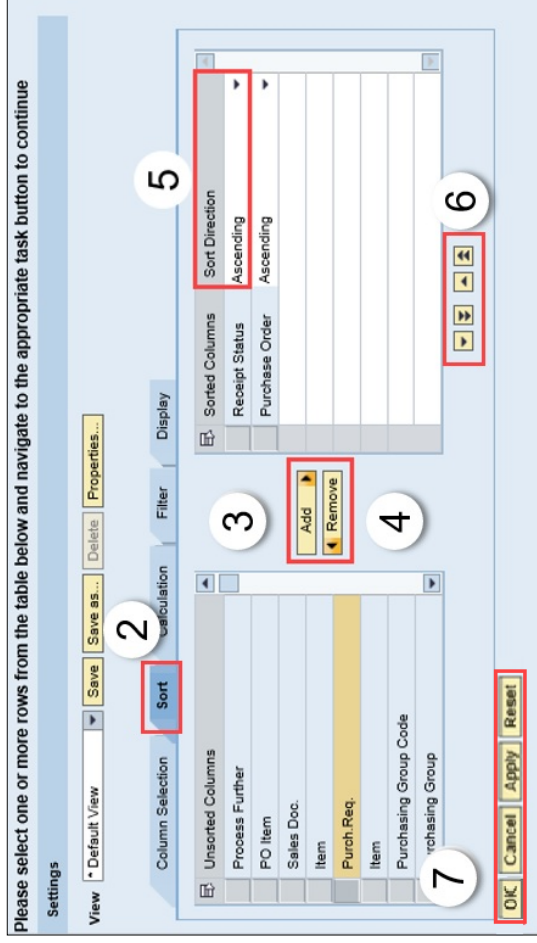


**Note:** If the **User-Defined Filter** or **Single Value** is selected, (the **Filter** icon) displays in the corresponding column header.

### Transaction Output Screen

Amount	Inb. Del. Doc.	Doc. Item
0.00	180442884	10
0.00	180442885	10
0.00	180442886	10
100.00	180442888	10
0.00	180442887	10
0.00	180442889	10
0.00	180442892	10
0.00	180442891	10
0.00	180442890	10

Please select one or more rows from the table below and navigate to the appropriate task button to continue



**Settings**

View \* Default View Save Save as... Delete Properties...

Column Selection **Sort** Calculation Filter Display

**Sorted Columns**

Sorted Columns	Sort Direction
Receipt Status	Ascending
Purchase Order	Ascending

**Unsorted Columns**

Process Further	
PO Item	
Sales Doc.	
Item	
Purch. Req.	
Item	
Purchasing Group Code	
Purchasing Group	

OK Cancel Apply Reset



### Sort Multiple Columns

Users can apply multiple filters to organize data by using the sort feature located in the *Settings Dialog* window.





1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

**Note:** If necessary, scroll right to display the **Open Settings Dialog** button.

2. In the expanded *Settings* window, select the **Sort** sub-tab.
  - The **Unsorted Columns** table lists available columns that are not currently used to sort the view.
  - The **Sorted Columns** table lists columns that are sorted in the view.

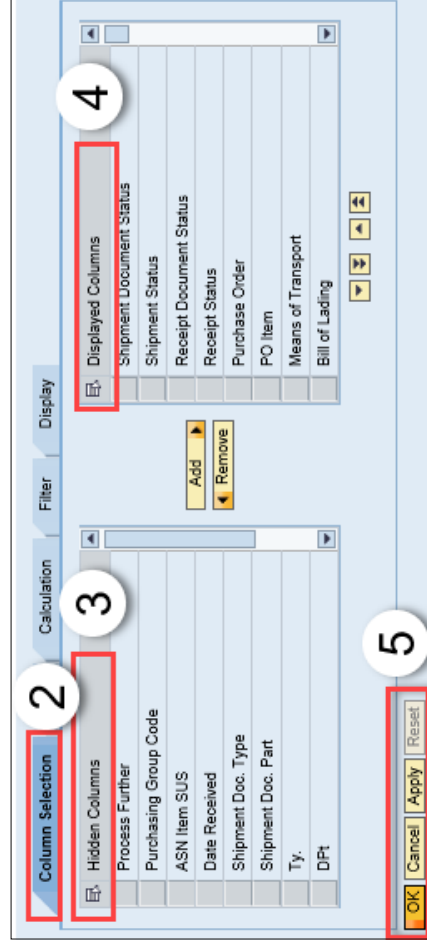
3. To use a column for sorting, select the column name from the **Unsorted Columns** table on the left and click  (the **Add** button).
4. To stop sorting for a column, select the column name from the **Sorted Columns** table on the right and click  (the **Remove** button).
5. For each of the **Sorted Columns**, select a **Sort Direction**. By default, columns are sorted in Ascending order.

6. Use  (the **Move Item** buttons) to move a column up or down on the list to the required position.

7. Choose an action:
  - To sort the data, click  (the **OK** button).
  - To exit without saving the changes, click  (the **Cancel** button).
  - To preview changes, click  (the **Apply** button).
  - To restore all original settings, click  (the **Reset** button).

### Transaction Output Screen

Amount	Inb. Del. Doc.	Doc. Item
0.00	180442884	10
0.00	180442885	10
0.00	180442886	10
100.00	180442888	10
0.00	180442887	10
0.00	180442889	10
0.00	180442892	10
0.00	180442891	10
0.00	180442890	10


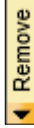






### Add / Remove Columns

The user can add or remove columns on the screen.

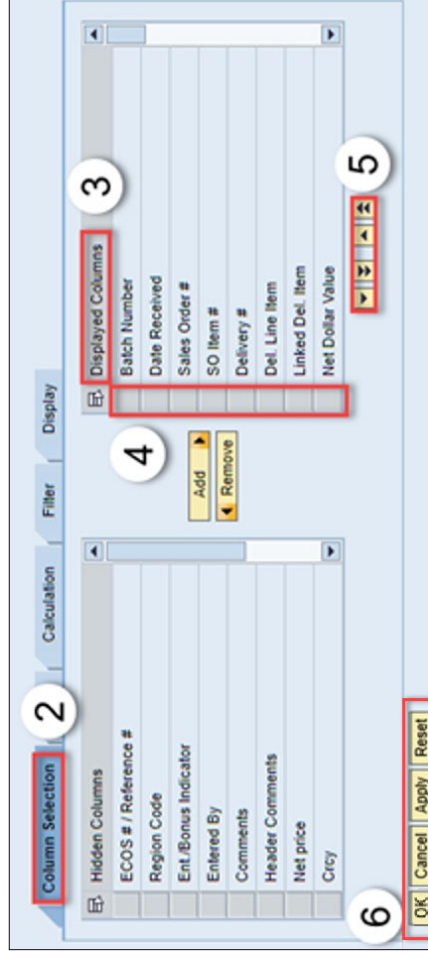
1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

**Note:** If necessary, scroll right to display the **Open Settings Dialog** button.

2. In the expanded *Settings* window, select the **Column Selection** tab.
  - The **Hidden Columns** table lists available columns that are not currently displayed in the view.
  - The **Displayed Columns** table lists columns that are currently included in the view.
3. To add a column to the screen, select the column name from the **Hidden Columns** table and click  (the **Add** button).
4. To remove a column from the screen, select the column name from the **Displayed Columns** table and click  (the **Remove** button).
5. Choose an action:
  - To add or remove selected column(s), click  (the **OK** button).
  - To exit without saving the changes, click  (the **Cancel** button).
  - To preview changes, click  (the **Apply** button).
  - To restore all original settings, click  (the **Reset** button).

### Transaction Output Screen

Amount	Inb. Del. Doc.	Doc. Item
0.00	180442884	10
0.00	180442885	10
0.00	180442886	10
100.00	180442888	10
0.00	180442887	10
0.00	180442889	10
0.00	180442892	10
0.00	180442891	10
0.00	180442890	10



### Move Columns

In the output table, users can drag and drop columns to change the order in which they display. Alternatively, users can view and modify the position of columns from the *Settings* window.


1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.





**Note:** If necessary, scroll right to display the **Open Settings Dialog** button.

2. In the expanded *Settings* window, select the **Column Selection** tab.

3. The **Displayed Columns** table indicates the order in which columns are displayed, left-to-right, on the screen.

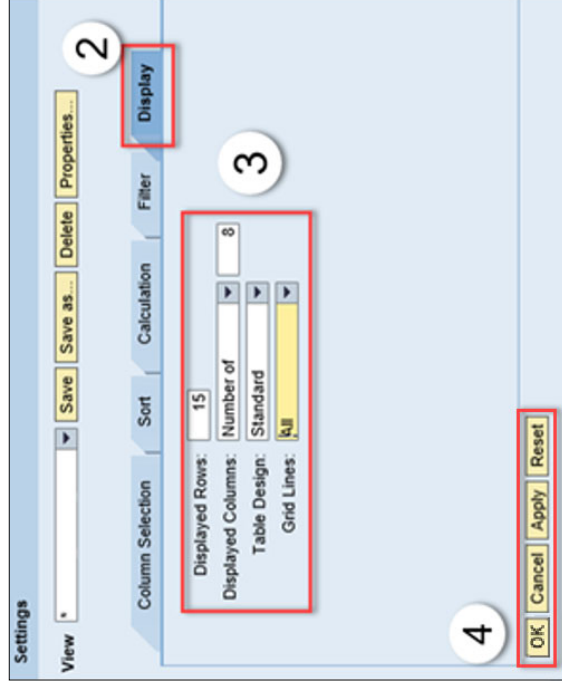
4. Click  (the **Select** button) to the left of a column name to select it.

5. Use  (the **Move Item** buttons) to move the selected column(s) up or down on the list to the required position. Use the single arrow to move the column up or down one position. Use the double arrow to move the column to the top or bottom of the list.

6. Choose an action:
  - To change the order of the column(s), click  (the **OK** button).
  - To exit without saving the changes, click  (the **Cancel** button).
  - To preview changes, click  (the **Apply** button).
  - To restore all original settings, click  (the **Reset** button).

### Transaction Output Screen

Amount	Inb. Del. Doc.	Doc. Item
0.00	180442884	10
0.00	180442885	10
0.00	180442886	10
100.00	180442888	10
0.00	180442887	10
0.00	180442889	10
0.00	180442892	10
0.00	180442891	10
0.00	180442890	10







### Update the Display

Users can change the appearance of the output through the *Display* tab in the *Settings* window. To optimize how the content area displays columns and rows, the view can be customized to display 15 rows and 8 columns. See below for details.

1. Click  (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

**Note:** If necessary, scroll right to display the **Open Settings Dialog** button.

2. Select the *Display* tab.
3. The following display options are available for selection:
  - **Displayed Rows:** Indicates the number of rows to be displayed on the screen at once. This does not impact the number of rows in the output; to view additional rows use the vertical scrollbar. Recommended setting is **15**.
  - **Displayed Columns:** Indicates the number of columns to be displayed on the screen at once. This does not impact the number of columns in the output; to view additional columns, use the horizontal scrollbar. Recommended setting is **8**.
  - **Table Design:** Indicates the shading used in the table. Options include **Alternating** (transparent/tinted), **Standard** (all tinted), and **Transparent**. **Standard** is the default selection.
  - **Grid Lines:** Visible borders within the table. Options include **All**, **None**, **Vertically**, or **Horizontally**.
4. Choose an action:
  - To change the display preference(s), click  (the **OK** button).
  - To exit without saving the changes, click  (the **Cancel** button).
  - To preview changes, click  (the **Apply** button).
  - To restore all original settings, click  (the **Reset** button).

## Transaction Output Screen

Amount	Inb. Del. Doc.	Doc. Item
0.00	180442884	10
0.00	180442885	10
0.00	180442886	10
100.00	180442888	10
0.00	180442887	10
0.00	180442889	10
0.00	180442892	10
0.00	180442891	10
0.00	180442890	10

Settings

View Save As Save Save as... Delete Properties... Properties...

Column Selection Sort Calculation Filter Display

Columns

- Calculation
- PO Quantity None
- Quantity Shipped None
- Delivery Quantity None
- Receipt Good Qty None
- Rejected Quantity None
- Damage Quantity None
- Over Quantity None
- Short Quantity None

Display Calculations at Start of Table  
 Display Preliminary Result  
 Collapse to Intermediate Results

OK Cancel Apply Reset

Settings

View Save As Save Save as... Delete Properties... Properties...

Column Selection Sort Calculation Filter Display

Columns

- Calculation
- PO Quantity None
- Quantity Shipped None
- Delivery Quantity None
- Receipt Good Qty None
- Rejected Quantity None
- Damage Quantity None
- Over Quantity None
- Short Quantity None

Display Calculations at Start of Table  
 Display Preliminary Result  
 Collapse to Intermediate Results

OK Cancel Apply Reset

## Perform Calculations

Users can include calculations for columns that include numeric values through the *Calculation* tab in the *Settings* window.

1. Click (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

**Note:** If necessary, scroll right to display the **Open Settings Dialog** button.

2. Select the *Calculation* tab.

3. For any of the listed **Columns**, select a calculation type from the dropdown in the **Calculation** column. The following options are available:

- **None:** No calculations are performed for this column.
- **Total:** Displays the sum total for all line items in this column.
- **Minimum:** Displays the lowest value in this column.
- **Maximum:** Displays the highest value in this column.
- **Mean Value:** Displays the average value for this column.

4. The following display options are available for selection. Users may select one, multiple, or none:

- **Display Calculations at Start of Table:** Displays calculations at the top of the table for the selected columns.
- **Display Preliminary Result:** Includes subtotal calculations for each of the selected columns.
- **Collapse to Intermediate Results:** Displays only the totals for each of the selected columns.

5. Choose an action:

- To change the display preference(s), click (the **OK** button).
- To exit without saving the changes, click (the **Cancel** button).
- To preview changes, click (the **Apply** button).
- To restore all original settings, click (the **Reset** button).

### Transaction Output Screen

Amount	Inb. Del. Doc.	Doc. Item
0.00	180442884	10
0.00	180442885	10
0.00	180442886	10
100.00	180442888	10
0.00	180442887	10
0.00	180442889	10
0.00	180442892	10
0.00	180442891	10
0.00	180442890	10

Worklist | Daily Invoices

W... From Search Results

Please select one or more rows from the table below and navigate to the appropriate task button to continue

Settings

View: Default View | Save | Save as... | Delete | Properties...

Column Selection | Sort | Calculation | Filter | Display

Hidden Columns: Process Further, Purchasing Group Code, ASN Item SUS, Date Received, Shipment Doc. Type, Shipment Doc. Part, Ty., Dpt.

Displayed Columns: Shipment Document Status, Shipment Status, Receipt Document Status, Receipt Status, Pur. Doc., P.O. Item, Means of Transport, Bill of Lading

Buttons: Add, Remove, OK, Cancel, Apply, Reset

Save View as

Description: Best View | Assignment: User

Initial View

Buttons: OK, Cancel

### Save a View

Users can save their customized layout for each screen with a **View** area. Saved views are only available to the user who created them.

1. Click (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the **Settings** window.

**Note:** If necessary, scroll right to display the **Open Settings Dialog** button.

2. Customize the view as needed:

- [Apply a Saved View](#)
- [Add / Remove Columns](#)
- [Move Columns](#)
- [Sort Columns](#)
- [Sort Multiple Columns](#)
- [Update the Display](#)

3. To save the layout for future use, click (the **Save As** button).

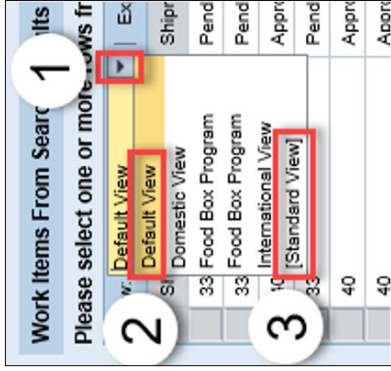
4. The **Save View As** window displays. Enter a description of the view in the **Description** field.

**Note:** Select the **Initial View** checkbox to indicate that the saved view is to be the initial view.

5. Click (the **OK** button) to save or (the **Cancel** button) to exit without saving.



### Transaction Output Screen



### Apply a Saved View

When data is displayed on an output screen, it defaults to the most recent layout view.

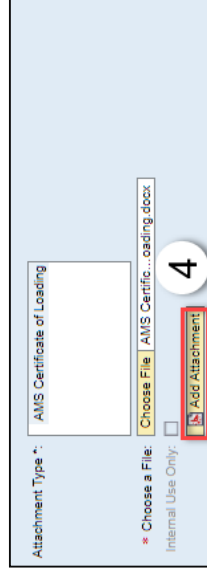
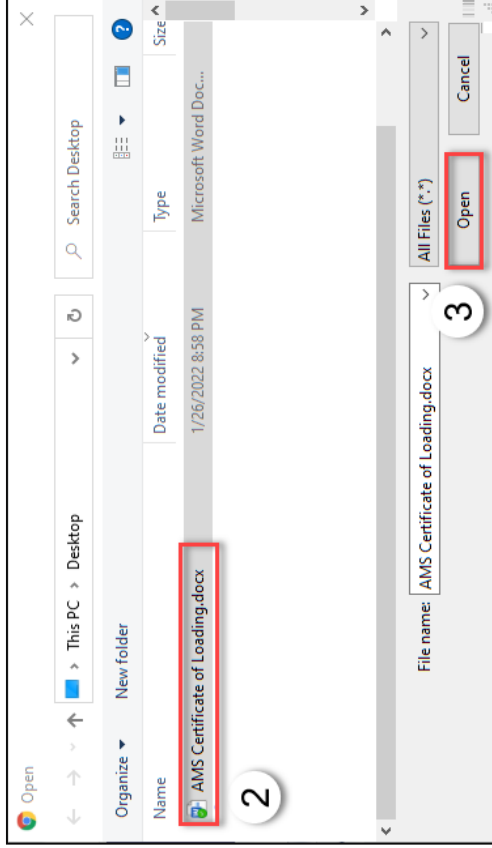
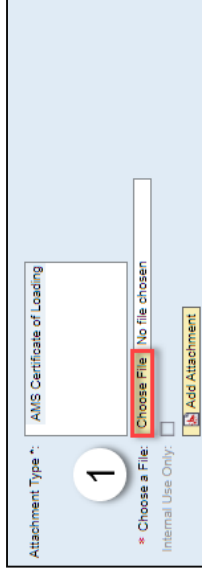
In addition to any WBSCM-defined views (Standard, Default, etc.), each user may use their own [saved views](#).

Users can select from available views to change the information that is included and how it is displayed based on their needs.

1. Select the **View** drop-down list.
2. The current view is shown as highlighted.
3. Select a different view from the current view on the list.


The view is automatically applied to the output.

## Document Upload Screen



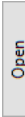
## Upload Document

To upload a document, navigate to the appropriate WBSCM transaction. In this example, the **e-Invoices for Processing** transaction is selected.

1. Click  (the **Choose file** button).
2. Locate and select the appropriate file to upload.

In this example, the **AMS Certificate of Loading** file is selected.

**Note:** Ensure the file to be uploaded is in the required format

3. Click  (the **Open** button).
4. Click the upload button. The button name will vary based on the transaction.

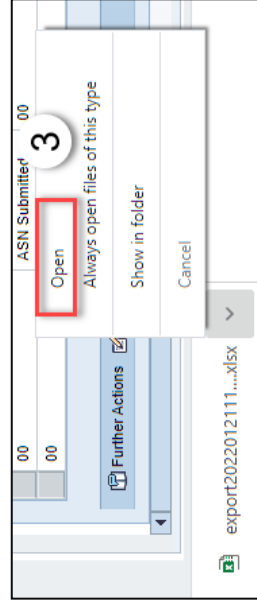
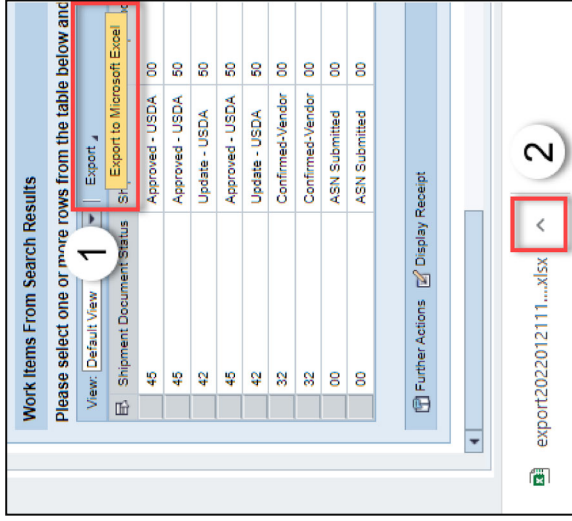
In this example, click  (the **Add Attachment** button).

**Notes:** Some transactions require additional steps to finalize the upload.

If the upload fails due to an **HTML tags found in PDF** error, perform the following to resolve:

- Open the PDF document in Adobe Reader.
- Print with the **Microsoft Print to PDF** option.
- Click the **Print** button. A new PDF document is created.
- Save the new PDF and upload to WBSCM.

## Document Download Screen





## Download / Export Document

To download or export a document, navigate to the appropriate WBSCM transaction. In this example, the **e-Invoices for Processing** transaction is selected.

1. Click the download button. The button name will vary based on the transaction.  
In this example, click  (the **Export** button) and select **Export to Microsoft Excel** from the drop-down.

**Note:** A file download prompt displays at the bottom of the screen for all document types except PDF files.

2. Click  (the **Arrow** button) to display a list of options.
3. Click  (the **Open** option).

**Note:** The user can select the **Always open files of this type** option to set as the default option.

**Note:** The file opens in a new window. Return to the browser to continue using WBSCM.

**Note:** PDF documents automatically open on a browser preview tab in Chrome. The user may update their browser settings to enable PDF file downloads and change the default PDF viewer. Refer to the [WBSCM Browser Settings and Helpful Tips](#) Job Aid for additional details.



### Context Sensitive Help Screen

PO Item	Means of Transport	Bill of Lading	Shipment Reference	Inspection I
1	Truck	R1	E1	
2	Truck	R1	E1	
3	Additional Shipment	R2	E2	
	Truck	R1	E1	
	Additional Shipment	R2	E2	

### WBSCM Help Options

Related Help documents can be accessed directly from within the transaction. This is referred to as context sensitive help. To access context sensitive help, follow the path **Options** → **Help** in a transaction. If multiple Help documents for the transaction exist, a list of choices will display.

WBSCM Help documents are available in several formats:

- **Work Instructions** (default): Detailed step-by-step instructions, which include transaction details, screenshots, notes, and field definitions. Work instructions are available in PDF or Word format.
- **Quick References**: Summarized step-by-step instructions, which include transaction details, but do not include screenshots or field definitions. Quick references are available in PDF or Word format.
- **Simulation (HTML)**: An interactive simulation of the transaction. Select Auto Playback Tutorial to watch the transaction steps. Select Standard Tutorial for hands-on interaction with the transaction steps.
- **Job Aids**: Quick reference documents that provide guidance for reports, general navigation and user preference tips, and miscellaneous references such as process flows and key terms.

For additional information refer to the [WBSCM Help Documentation](#) job aid.

### Service Desk

WBSCM Service Desk Contact Information:

877-WBSCM-4U or 877-927-2648

8:00am – 6:00pm ET Monday-Friday (excluding holidays)

Email: [WBSCM.servicedesk@CACI.com](mailto:WBSCM.servicedesk@CACI.com)

**Search Results**  
Search terms should be separated by spaces, and phrases delimited by quotes, unless indicated otherwise.

Terms: e-invoices.processing.v  
Type: All  
Location: All

SEARCH

Results shown 1 - 9 of 9.

Title	Added or Modified
How to Submit Domestic Electronic Invoice (eINV) Video	10/16/19 10:26 AM
Re-Submitting Rejected Domestic Electronic Invoice (eINV) Video	10/16/19 10:25 AM
How to Modify a Goods Receipt and Submit an Electronic Invoice (eINV) Video	11/27/19 9:32 AM
Process Domestic Shipments Variable Weight - Vendor (eINV)	2/13/20 9:32 AM
Display eInvoice - Vendor (eINV)	5/19/20 3:44 PM
Create eInvoice Worklist using Wildcard Search	5/19/20 3:47 PM



## **WBSCM Help Documentation Job Aid**

This job aid describes two methods for accessing help resources in WBSCM for on-the-job support. These methods include:

- Context Sensitive Help – Displays transaction related help documentation while using a WBSCM transaction.
- Online Help Documentation Library – Displays all materials organized by user community, business area, and process; access to some items is limited by user role.

Additionally, this job aid provides instructions on how users can search for relevant training materials based on keywords or phrases.

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## Context Sensitive Help

WBSM has an on-screen help feature to provide assistance related to the current transaction. To launch help:

- Click **Options** (the **Options** button) on the right side of the screen.
- Select **Help** (the **Help** option).

A new window opens and displays the help materials that relate to the transaction. If more than one related help document is available, users are prompted to select from a list. The selected document opens, and the selection screen closes. In the example below, Context Sensitive Help for the Order Status Report launches the related step-by-step work instruction. The default option is Work Instruction; however, users can use the drop-down menu in the upper right corner to select another document type.

The screenshot shows the WBSM web application interface. At the top, there is a navigation bar with tabs for Home, Operations, Finance, Admin, Reports, Tools & Monitoring, Help, and Helpdesk. Below this is a sub-navigation bar with tabs for Procurement, Operations, Order Processing, Recall Administration, Supplier Mgt, Warehouse Management, Complaint Administration, and Ad-Hoc Reporting. The main content area is titled 'Reports : Input Criteria' and contains a search form for 'Order Status Report'. The form includes fields for Program, Req. Delivery Date, Material, Sold-To Party, Ship-To Party, Region Code, Purchasing Group, Status, Order Type, Order Number, and Shipment Receipt Date. A 'Help' button is located in the top right corner of the main content area. A new window titled 'Review Order Status Report - Internet Explorer' is open, displaying a 'Work Instruction' document titled 'Review Order Status Report'. The document includes a 'PROCESS OVERVIEW' section with a 'Purpose' section and a list of status codes.



Expand the context sensitive help window to view the document in full screen. The drop-down document type menu appears as a tile for document type selection.

The screenshot shows the USDA WBSCM Training interface. At the top, there is a search bar and navigation links for 'Log In' and 'Language (en\_US)'. The breadcrumb trail reads: Home >> WBSCM Training >> Work Instructions >> Internal >> FUL >> Domestic >> Review Order Status Report. Below the breadcrumb, there is a document type menu with three options: 'Work Instruction' (selected), 'Quick Reference', and 'Simulation (HTML)'. The 'Simulation (HTML)' option is highlighted with a red box. To the right of the menu are 'Print PDF' and 'Download' buttons. The main content area is titled 'Review Order Status Report' and has a 'PROCESS OVERVIEW' section. Under 'Purpose', it explains that the report provides detail on orders throughout their life cycle. A list of status codes is provided: Approved by SDA, Returned by SpAgency, Cancelled, Approved by SpAgency, On invitation, Purchased, Order Received, and Applied. Under 'Process Trigger', it states the report is intended for FNS Order Managers, SDA/ITO, and Ship-Tos. Under 'Prerequisites', there is no text. At the bottom left, there are links for 'Home' and 'Glossary'.

## Access Training Simulations

WBSCM offers simulations in HTML format which users can view or use to practice a WBSCM transaction. Simulations are available for every transaction that has an associated Work Instruction. Simulations act as an interactive audiovisual of the transaction and can be launched in two different ways:

- **Auto Playback Tutorial** allows the user to review as a playback movie.
- **Standard Tutorial** allows the user to review or practice the transaction as an interactive simulation.

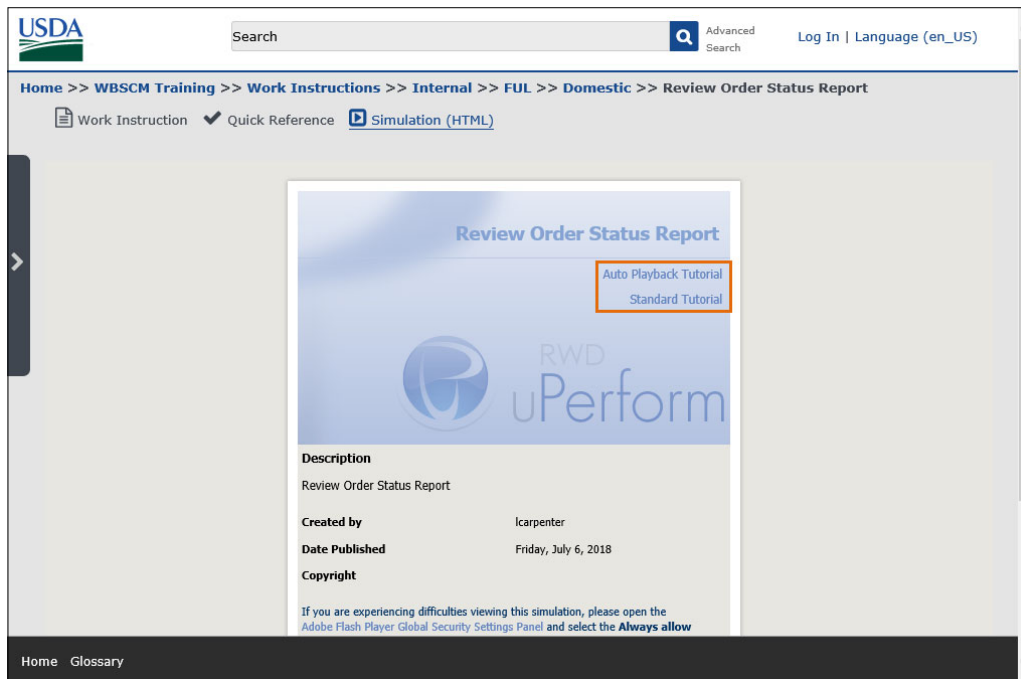
Access the Help option and select Simulation (HTML) to open a new browser window containing the online tutorial.



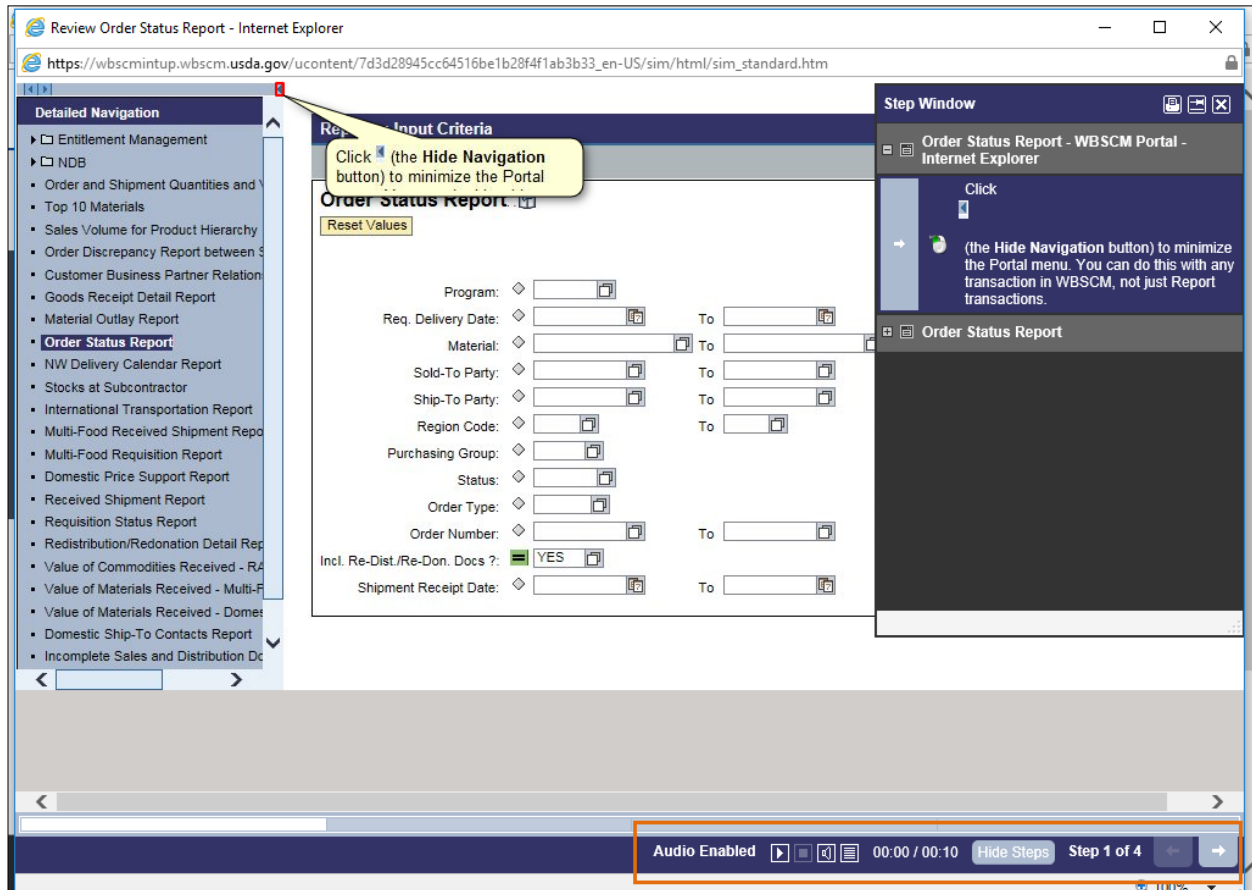
The screenshot shows the WBSCM web application interface. At the top, there is a navigation menu with tabs for Home, Operations, Finance, Admin, Reports, Tools & Monitoring, Help, and Helpdesk. Below this is a sub-menu for Procurement, Operations, Order Processing, Recall Administration, Supplier Mgt, Warehouse Management, Complaint Administration, and Ad-Hoc Reporting. The current page is 'Order Status Report' under 'Reports > Order Processing > Order Status Report'. A 'Full Screen' button and an 'Options' dropdown menu are visible. The 'Options' menu is open, showing 'Open in New Window', 'Refresh', 'Help' (highlighted in orange), 'Details', and 'Add to Portal Favorites'. An orange arrow points from the 'Help' option in the menu to the 'Simulation (HTML)' link in the breadcrumb navigation. The breadcrumb path is: Home >> WBSCM Training >> Work Instructions >> Internal >> Full >> Domestic >> Review Order Status Report. Below the breadcrumb, there are links for 'Work Instruction', 'Quick Reference', and 'Simulation (HTML)'. The main content area is titled 'Review Order Status Report' and includes a 'PROCESS OVERVIEW' section with a 'Purpose' paragraph and a list of status codes: Approved by SDA, Returned by SpAgency, Cancelled, Approved by SpAgency, On invitation, Purchased, Order Received, and Applied. There are also sections for 'Process Trigger' and 'Prerequisites'.



A window displays enabling the user to access one of the two simulation playback options.

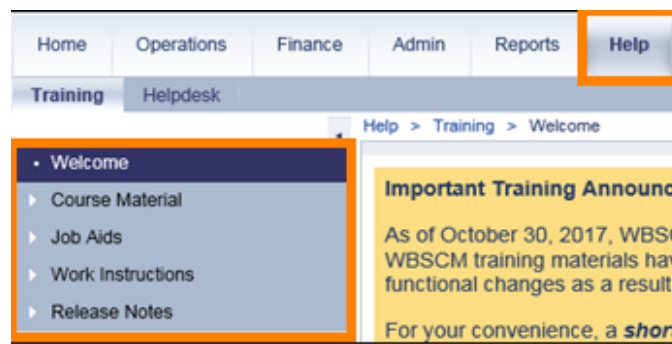


Selecting one of the options launches the Simulation in the browser window. Users can pause, repeat, or advance automated steps during replay using the navigation icons at the bottom of the screen.



## Online Help Documentation Library

A library of training materials is available under the **Help** module tab of WBSCM. Training materials are categorized by training product type, including Course Materials, Job Aids, Work Instructions, and Release Notes.





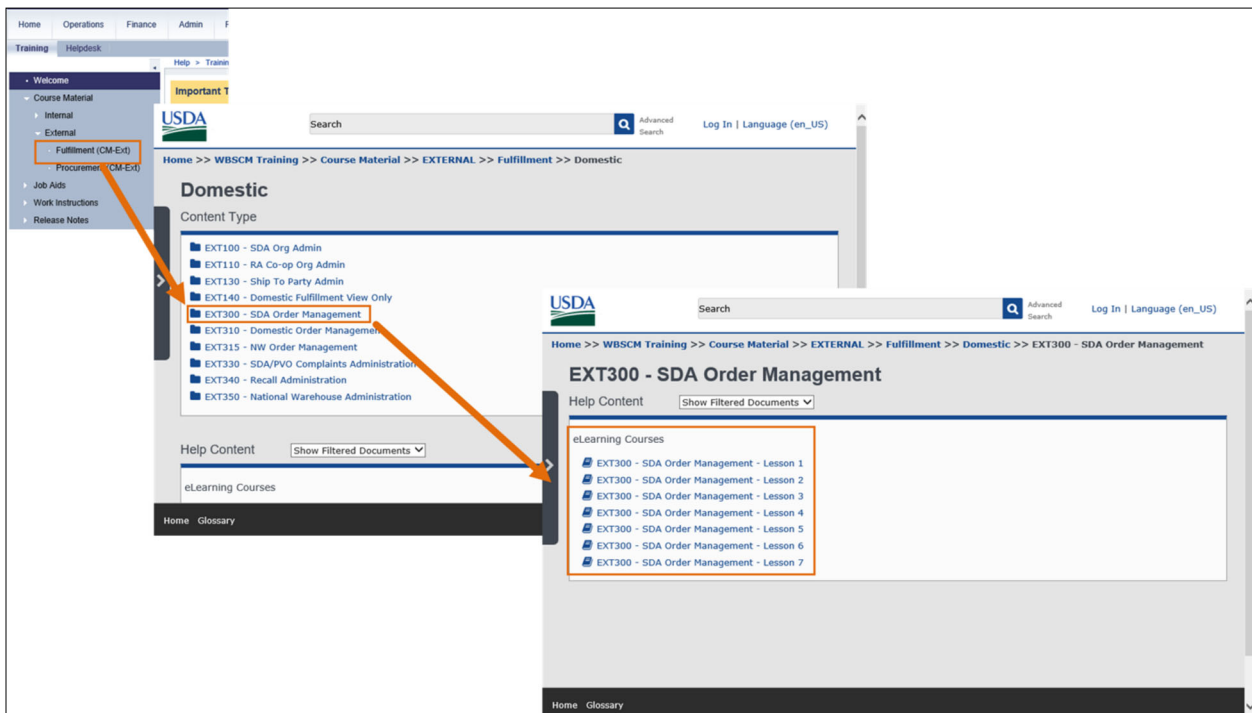
## Course Material

Course Material includes self-paced eLearning modules and materials from WBSCM instructor-led training courses. Each course covers the USDA business process and the WBSCM transactions for a particular area and/or user role. Course materials are available on various topics, including WBSCM overview, submitting offers, advanced shipping notifications, invoices, process flows, reports, vendor-related topics, and much more.

Course Material is organized into folders based on user community and functional area. Some courses are further divided into multiple lessons.

To browse to relevant Course Material, select the user community (Internal or External), then select the business area and focus (Domestic or International). Review the list of courses to identify which topic is of interest; select a course to view it or a list of lessons.

**Example:** Course Material → External → Fulfillment (CM-Ext) → Domestic → EXT300 - SDA Order Management



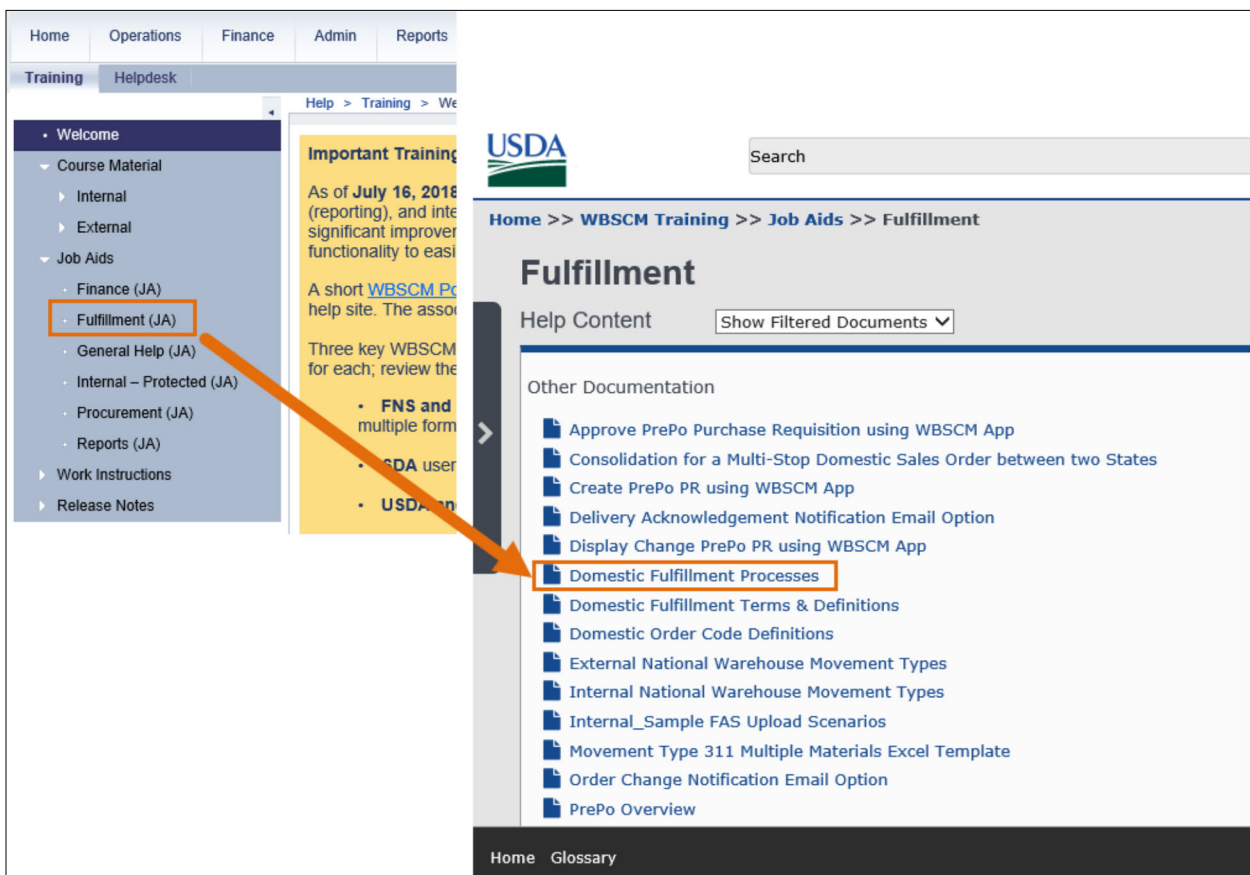
## Job Aids

Job Aids are quick reference documents that provide guidance for reports, processes, general navigation, and many more topics that do not require an in-depth work instruction.

Topics are sorted within folders by category, including general help, reports, and specific business processes.

To browse for a Job Aid, select the applicable business unit, general, or reports folder. Each folder displays all quick reference documents for the selected topic.

**Example:** Job Aids → Fulfillment (JA) → Domestic Fulfillment Processes

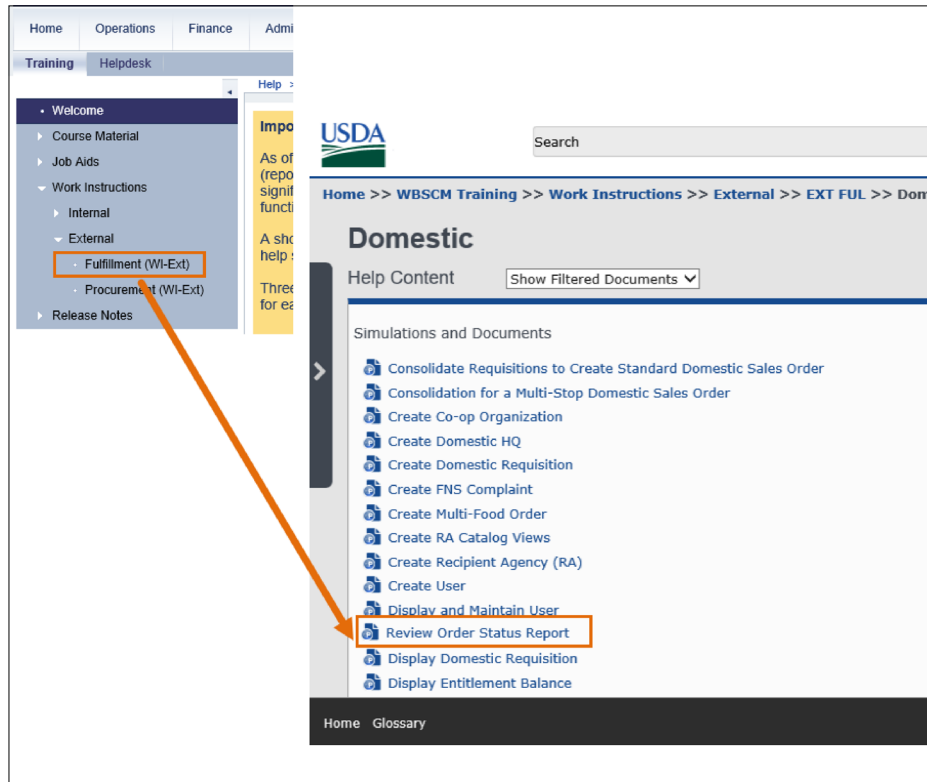


## Work Instructions:

The Work Instructions folder contains documents with various topics that provide procedural step-by-step instructions with screenshots on how to execute a specific task or transaction. These documents guide users through a transaction from start to finish.

Work Instruction sub folders are organized by user role and functional area. Internal folders display work instructions for USDA/USAID users and other authorized internal users. External folders display work instructions for vendors, customers, and other business partners.

When a Help topic is opened, users can select the document type that suits their needs. The default option is Work Instruction; however, users can use the drop-down menu in the upper right corner to select another document type.



From the document selection tile, users can select from several formats for the training material:

- **Work Instruction:** Detailed step-by-step instructions, which include transaction details, screenshots, notes, and field definitions. Additionally, work instructions are available in PDF and Microsoft Word formats
- **Quick Reference:** Summarized step-by-step instructions, which include transaction details, but do not include screenshots or field definitions. Additionally, quick references are available in PDF and Microsoft Word formats
- **Simulation (HTML):** An interactive simulation of the transaction. Select Auto Playback Tutorial to review as a playback movie. Select Standard Tutorial to review or practice the transaction as an interactive simulation.

**Example:** Work Instructions → External → Fulfillment (WI-Ext) → Review Order Status Report → (Select document type)

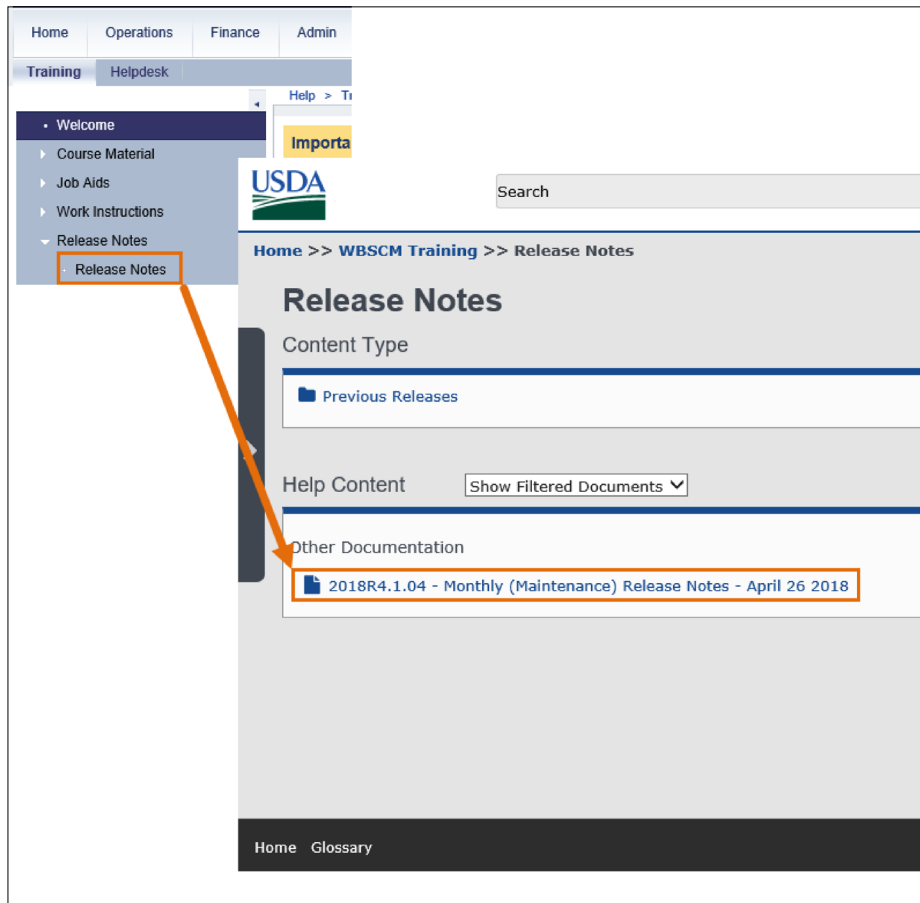


## Release Notes

A Release Notes document is an official WBSCM document that summarizes the implementation of system upgrades, fixes, new features, and enhancements to the WBSCM system. The release notes document is distributed monthly to all WBSCM users through an email broadcast message.

To view the current release notes, click the **Release Notes** link on the left-hand navigation pane. To view the release notes from previous releases, click the **Release Notes** → **Release Notes** → **Previous Releases** link, and select the desired year.

**Example:** Release Notes → Release Notes → (Select the current Release Notes document)



### Online Help Documentation Library - Search

The Online Help library has a robust search functionality. Once accessed, the selected resource(s) is displayed in a new window or in a new tab, depending on the browser settings. The Search feature is in the top center of the window.



Enter a keyword to search both the title and content of the materials in the online help library. Search can be performed using any of the following criteria:

- Type the whole keyword
- Use quotes ("" ) to search a specific phrase
- Use the asterisk (\*) for wildcard searches

In the example below, a search for "order status" returned matches in the training materials where only the exact phrase is referenced. In contrast, a search without the quotation marks would also have included every document that included the words "order" and "status" separately.



USDA Log In | Language

## Search Results

Search terms should be separated by spaces, and phrases delimited by quotes, unless indicated otherwise.

New Search

Terms:

Type:  ▼

Location:  ▼

**SEARCH**

### Search Results

Results shown 1 - 10 of 39.

Title	Added or Modified
<a href="#">Sales Order and Complaint Statuses</a>	6/29/17 1:01 PM
<a href="#">Review Order Status Report</a>	7/6/18 12:49 PM

[Home](#) [Glossary](#)

### Online Help Documentation Library - Glossary

A glossary is available from the online help documentation library. To launch, select the Glossary button at the bottom of the screen and search for a required WBSCM term.



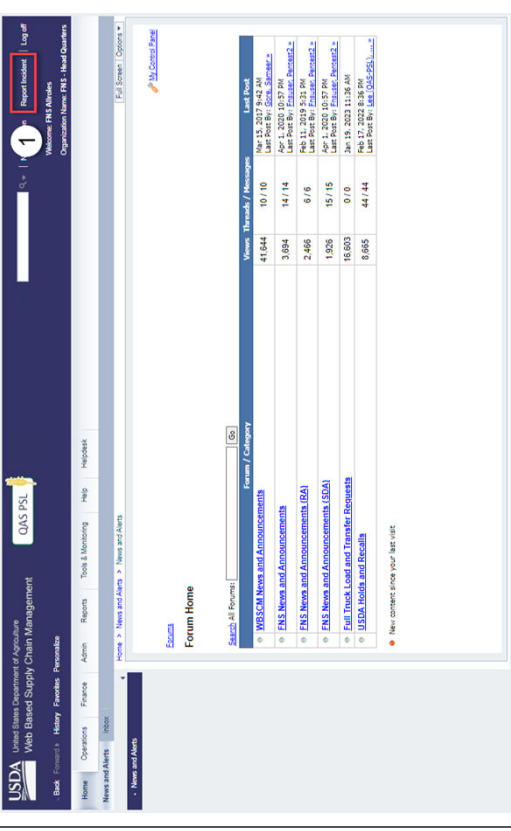


The screenshot displays the WBSCM Training website interface. At the top left is the USDA logo. A search bar is located at the top center with the text "Search" and a magnifying glass icon. To the right of the search bar are links for "Advanced Search" and "Log In | Language (en\_US)". Below the search bar, the page title is "Home >> WBSCM Training". The main heading is "WBSCM Training", followed by the subtitle "USDA Web Based Supply Chain Management (WBSCM) Project". A "Content Type" section lists four categories: "Course Material", "Job Aids", "Release Notes", and "Work Instructions".

The lower portion of the screenshot shows the "Glossary" page. A search box is highlighted with an orange border and contains the text "Find Term:". Below the search box is a magnifying glass icon. A navigation menu on the left side of the page has "Glossary" selected, with an orange arrow pointing to the search box. The footer of the page contains the text "Home Glossary".



**Job Aid**  
**Create and Manage a WBSCM Incident**

<p><b>Job Aid Title</b></p>	<p>Create and Manage a WBSCM Incident</p>																												
<p><b>Purpose</b></p>	<p>Use this procedure when the user needs support from the WBSCM Service Desk. Once the user has requested support, they can track the status of their Incident(s) and review reports. This document reviews the different ways to log Incidents and the steps to track Incidents via the WBSCM Service Desk website.</p>																												
<p><b>WBSCM Service Desk Contact Information</b></p>	<p><b>Email:</b> <a href="mailto:WBSCM.ServiceDesk@CACI.com">WBSCM.ServiceDesk@CACI.com</a>  <b>Phone:</b> (877) WBSCM-4U or (877) 927-2648 - 8AM to 6PM EST MON-FRI, Excluding Holidays  <b>Website:</b> <a href="https://cacifedramp.servicenowservices.com/wbscm/">https://cacifedramp.servicenowservices.com/wbscm/</a> - 24/7 Self-Service support</p>																												
<p><b>WBSCM Service Desk Key Features</b></p>	<ul style="list-style-type: none"> <li>• Log Incidents via WBSCM</li> <li>• Log Incidents via the Service Desk</li> <li>• Check the status of Incidents</li> </ul>																												
<p><b>WBSCM Application – Home Screen</b></p>  <p>The screenshot shows the 'Forum Home' page of the WBSCM application. It features a navigation menu on the left with options like 'Home', 'Operations', 'Finance', 'Action', 'Reports', 'Tools &amp; Monitoring', 'Help', and 'Helpdesk'. The main content area displays a table of recent forum posts with columns for 'Views', 'Threads / Messages', 'Forum / Category', and 'Last Post'. A 'Report Incident' button is visible in the top right corner of the page.</p> <table border="1"> <thead> <tr> <th>Views</th> <th>Threads / Messages</th> <th>Forum / Category</th> <th>Last Post</th> </tr> </thead> <tbody> <tr> <td>41,644</td> <td>10 / 10</td> <td>WBSCM News and Announcements</td> <td>Nov 15, 2017 9:42 AM</td> </tr> <tr> <td>3,084</td> <td>14 / 14</td> <td>FNS News and Announcements</td> <td>Apr 1, 2020 10:52 PM</td> </tr> <tr> <td>2,466</td> <td>6 / 6</td> <td>FNS News and Announcements (USA)</td> <td>Apr 1, 2020 10:52 PM</td> </tr> <tr> <td>1,926</td> <td>15 / 15</td> <td>FNS News and Announcements (SDA)</td> <td>Apr 1, 2020 10:52 PM</td> </tr> <tr> <td>16,003</td> <td>0 / 0</td> <td>Full Track Load and Transfer Elements</td> <td>Jan 19, 2023 11:36 AM</td> </tr> <tr> <td>8,665</td> <td>44 / 44</td> <td>USDA, Hubs and Facilities</td> <td>Feb 17, 2022 8:26 PM</td> </tr> </tbody> </table>	Views	Threads / Messages	Forum / Category	Last Post	41,644	10 / 10	WBSCM News and Announcements	Nov 15, 2017 9:42 AM	3,084	14 / 14	FNS News and Announcements	Apr 1, 2020 10:52 PM	2,466	6 / 6	FNS News and Announcements (USA)	Apr 1, 2020 10:52 PM	1,926	15 / 15	FNS News and Announcements (SDA)	Apr 1, 2020 10:52 PM	16,003	0 / 0	Full Track Load and Transfer Elements	Jan 19, 2023 11:36 AM	8,665	44 / 44	USDA, Hubs and Facilities	Feb 17, 2022 8:26 PM	<p><b>Log a Support Request (Incident) via WBSCM</b></p> <ol style="list-style-type: none"> <li>1. Click <b>Report Incident</b> (the <b>Report Incident</b> link) from any screen or transaction.  <b>Note:</b> The link is located in the header section of WBSCM. The <i>Report WBSCM Incident</i> page displays.                  Complete each of the fields.  <b>Note:</b> The required fields have a red asterisk. It is recommended that the user fills in information in additional fields, if needed, to provide a detail view about the issue, question, or suggestion. It is also recommended to upload attachments. The attachment must be less than 10 MB. The following document types are accepted: PDF, DOCX, PPTX, XLSX, JPG, JPEG, PNG.</li> <li>3. Click <b>Submit</b> (the <b>Submit</b> button).</li> <li>4. Record the WBSCM Service Desk generated Incident number.  <b>Note:</b> The Incident number is sent to the user's email address set up in WBSCM.</li> </ol>
Views	Threads / Messages	Forum / Category	Last Post																										
41,644	10 / 10	WBSCM News and Announcements	Nov 15, 2017 9:42 AM																										
3,084	14 / 14	FNS News and Announcements	Apr 1, 2020 10:52 PM																										
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8,665	44 / 44	USDA, Hubs and Facilities	Feb 17, 2022 8:26 PM																										
<p><b>WBSCM Incident Screen</b></p>																													



# Job Aid Create and Manage a WBSM Incident

Report WBSM Incident

FNS Activities (ALLROLEFO03)  
Organization: FNS - Head Quarters (004000000)  
Email:

Please complete the form below to submit an incident with the WBSM Service Desk. Detailed information allows us to resolve your issue more quickly.

Incident Type and Impact:  There is issue impacting me.

\*Short Description (Required):  (50 character limit)

\*Please provide details about your issue, symptoms or suggestions. (Required):

Example: Enter a Bill Response, Order Consolidation, Goods Receipt, etc. (2000 character limit)

Please provide associated identifiers:

Examples: Sales Order Number, Purchase Order Number, etc. (2000 character limit)

For report issues, please provide exact name of report and selection criteria:

Please list error message(s):

Describe and attach screenshot below. (2000 character limit)

Describe and attach screenshot below. (2000 character limit)

Please provide a full page screenshot.

Upload File (pdf, docx, pptx, xls, jpg, png, etc. <10 MB per attachment)

How to Get Full Page Screenshot + Upload

3

Please review all information in the form. Submit your incident when ready.

**Log in to the WBSM Service Desk**

**Website:** <https://cacifedramp.servicenowservices.com/wbscm/>

All active WBSM user accounts have a corresponding account with the WBSM Service Desk (CACI FedRAMP Certified ServiceNow). These accounts are updated each business day, so new WBSM accounts will have access to the WBSM Service Desk within one business day.

**First Time Users:**

1. Enter the user's email address for both **Username** and **Password** fields in the login screen. Use all lowercase for both fields.
2. Change password when prompted.

**Existing Users:**

1. Enter the user's email address in the **Username** field.
2. Enter the user's password in the **Password** field.

**WBSM Service Desk – Log in Screen**

**Website:** <https://cacifedramp.servicenowservices.com/wbscm/>

**CACI** FedRAMP Certified Platform  
EVER VIGILANT

User name

Password

Remember me

[Forgot Password ?](#)

Welcome to Service Automation  
CACI's FedRAMP Certified ServiceNow transforms IT by automating and managing IT service relationships across the global enterprise. CACI deploys ServiceNow to create a single system of record for IT and automate manual tasks, standardize processes and consolidate legacy systems. Our customers use its extensible platform to create custom applications that evolve the IT service model to service domains inside and outside the enterprise.

**Log in to the WBSM Service Desk**

**Website:** <https://cacifedramp.servicenowservices.com/wbscm/>

All active WBSM user accounts have a corresponding account with the WBSM Service Desk (CACI FedRAMP Certified ServiceNow). These accounts are updated each business day, so new WBSM accounts will have access to the WBSM Service Desk within one business day.

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2. Change password when prompted.

**Existing Users:**

1. Enter the user's email address in the **Username** field.
2. Enter the user's password in the **Password** field.



**Job Aid**  
**Create and Manage a WBSCM Incident**

If the user is unable to log in with an email address, reset the password or contact the WBSCM Service Desk for assistance



### WBSCM Service Desk – Incident Screen Navigate to: Incident Management > Create Incident

### Log a Support Request (Incident) via Service Desk

This is an alternative way to log an Incident instead of directly in WBSCM.

1. Complete each of the fields displayed.
  2. If necessary, click (the **Paperclip** icon) to add an attachment. All attachments appear at the top of the screen once they have been added to the Incident.
  3. Click (the **Submit** icon) to submit the Incident.
  4. Record the WBSCM Service Desk generated Incident number.
- Note:** As the user completes the short description field, knowledge base articles related to the issue are displayed for review and support prior to submitting the incident.

### Impact Guidelines

- **High** – User cannot properly perform a time-sensitive business activity that must be completed within the next 24-48 hours.
- **Medium** – One or more users experience slight disruption or operational functionality fails without an available alternative.
- **Low** – User observes minor issue(s) that do not impact the functionality of WBSCM.

### WBSCM Service Desk – Status Screen

Navigate to: Incident Management > Status

Incidents (Self Service view)	Search	for text	
All	Number	Opened	Short description
	INC0335069	2020-08-07 16:47:01	Non-WBSCM
	INC0335070	2020-08-07 16:47:02	RE-URGENT: Not able to open award for sol 2000007128 in review & process award
	INC0335067	2020-08-07 16:20:48	RE-Allen - "Brian" - Ohio Follow-Up / SOW 5000622103
	INC0335066	2020-08-07 15:50:53	Food Box SF-30 Question

### Check Status of a Submitted Incident

Users can review all Incidents created under their own account.

1. Click the **Number** to open the Incident.
2. Review the **Status** field and other information related to the Incident.

If needed, users can locate a specific Incident with the following tools:

- To search for a submitted Incident, click (the **dropdown** arrow) next to **Search**. Options include:
  - Number – Enter the Incident number (INC0#####), if known.
  - Opened – Enter the date the Incident was opened.
  - Short Description
  - Text
- To narrow or expand the list of Incidents, click (the **Filter** icon).

### Incident Statuses

- **New** – Incident is created, but not yet saved.



**Job Aid**  
**Create and Manage a WBSCM Incident**

- **Active** – Incident has been saved and is currently being addressed by an analyst.
- **Awaiting User Info** – The analyst has requested additional information from the user.
- **Resolved** – A solution has been provided and the issue is resolved. Resolved Incidents may be reopened within 48 hours.
- **Closed** – The WBSCM Service Desk automatically closes Resolved Incidents after 48 hours. Closed Incidents cannot be reopened.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to display or post messages to a discussion forum on the WBSCM Home Page.

### Process Trigger

Use this procedure to display or post messages to a discussion forum on the WBSCM Home Page.

### Prerequisites

- None.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Home** tab → **News and Alerts** link to go to the *Forums : Forum Home* screen.

### Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A **Conditional** field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An **Optional** field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

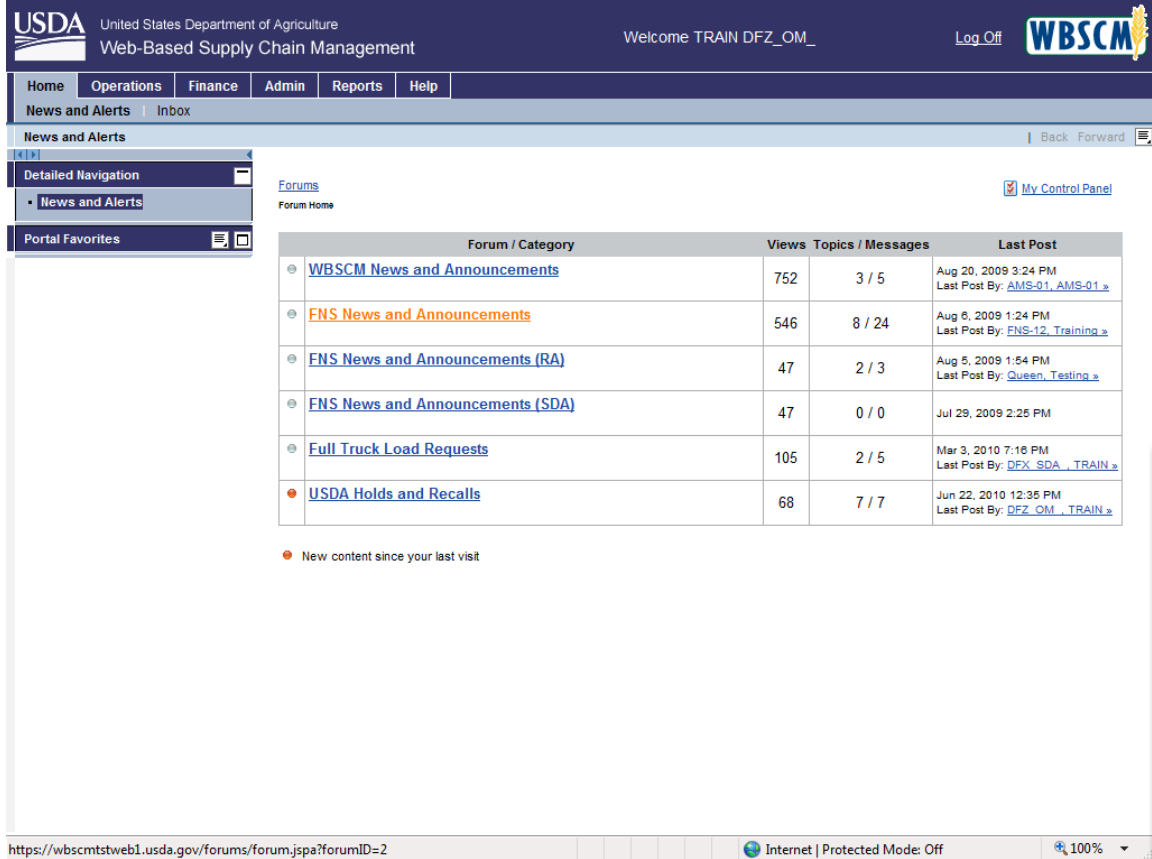
### Reminders

- Remember to check your work
- Refer to the Help Option in the Portal for further assistance.

## PROCEDURE

1. Start the transaction using the following Portal path: **Home** tab → **News and Alerts**

### Forums : Forum Home Screen



Forum / Category	Views	Topics / Messages	Last Post
<a href="#">WBSCM News and Announcements</a>	752	3 / 5	Aug 20, 2009 3:24 PM Last Post By: <a href="#">AMS-01, AMS-01</a>
<a href="#">FNS News and Announcements</a>	546	8 / 24	Aug 6, 2009 1:24 PM Last Post By: <a href="#">FNS-12, Training</a>
<a href="#">FNS News and Announcements (RA)</a>	47	2 / 3	Aug 5, 2009 1:54 PM Last Post By: <a href="#">Queen, Testing</a>
<a href="#">FNS News and Announcements (SDA)</a>	47	0 / 0	Jul 29, 2009 2:25 PM
<a href="#">Full Truck Load Requests</a>	105	2 / 5	Mar 3, 2010 7:16 PM Last Post By: <a href="#">DFX, SDA, TRAIN</a>
<a href="#">USDA Holds and Recalls</a>	68	7 / 7	Jun 22, 2010 12:35 PM Last Post By: <a href="#">DFZ_OM, TRAIN</a>

● New content since your last visit

2. Click [FNS News and Announcements](#) (the **FNS News and Announcements** link) to go to that particular forum.



(Note) The forums that a user can see will depend on the user's agency, whether they are an internal or external user, and whether they are domestic or international. Some users will have posting rights whereas others will have view-only rights.



Forums : FNS News and Announcements Screen

The screenshot shows the 'FNS News and Announcements' forum page. At the top, there is a navigation bar with 'Home', 'Operations', 'Finance', 'Admin', 'Reports', and 'Help'. Below this is a 'News and Alerts' section with a search bar and a 'Go' button. The main content area displays a list of forum threads with columns for 'Thread', 'Author', 'Views', 'Replies', and 'Last Post'. The threads include titles like 'test', 'which stop for the white house???', 'Eat at Cosi!!!', 'Asian Bistro Thursday 4:00 Happy Hours', 'cow joke', 'peggy can't fill any wbscm orders...', 'Let's talk about Ray', and 'WBSCM Training'. The bottom of the page shows the URL 'https://wbscmstweb1.usda.gov/forums/annpost/default.jspa?forumID=2' and the browser status bar.

Thread	Author	Views	Replies	Last Post
<a href="#">test</a> Posted By: <a href="#">FNS-01_Training</a> -- Aug 5, 2009 3:29 PM				
<a href="#">which stop for the white house???</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:58 PM				
<a href="#">Eat at Cosi!!!</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:54 PM				
<a href="#">Asian Bistro Thursday 4:00 Happy Hours</a> Posted By: <a href="#">FNS-03_Training</a> -- Aug 5, 2009 1:54 PM				
<a href="#">cow joke</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:52 PM				
<a href="#">peggy can't fill any wbscm orders...</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:50 PM				
<a href="#">Let's talk about Ray</a> Posted By: <a href="#">FNS-04_Training</a> -- Aug 5, 2009 1:48 PM				
<a href="#">WBSCM Training</a> Posted By: <a href="#">FNS-19_Training</a> -- Aug 5, 2009 1:47 PM				
<a href="#">happy hour thursday 4:00 Asian bistro</a>	<a href="#">FNS-03_Training</a>	41	3	Aug 6, 2009 1:24 PM Last Post By: <a href="#">FNS-12_Training</a>
<a href="#">I like chocolate.</a>	<a href="#">FNS-13_Training</a>	30	3	Aug 6, 2009 9:28 AM Last Post By: <a href="#">FNS-05_Training</a>
<a href="#">Monuments by Moonlight</a>	<a href="#">FNS-05_Training</a>	16	0	Aug 5, 2009 1:57 PM Last Post By: <a href="#">FNS-05_Training</a>

3. Click [Post Announcement](#) (the **Post Announcement** link) to post an announcement.



(Note) In some cases, you will have the option to post an announcement or a thread. The difference between announcements and threads is as follows: an announcement does not allow users to respond to it, whereas a thread allows for questions, replies, and responses.



**Forums : Post Announcement Screen**

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

Field	R/O/C	Description
Subject	R	Field used to identify the subsequent message or note.  <b>Example:</b> Apples Available for Bonus!
Body	R	The message to be posted on the discussion forum.  <b>Example:</b> Granny Smith Apples in 5/2 Lb bags will be available for bonus under the NSLP program starting today!

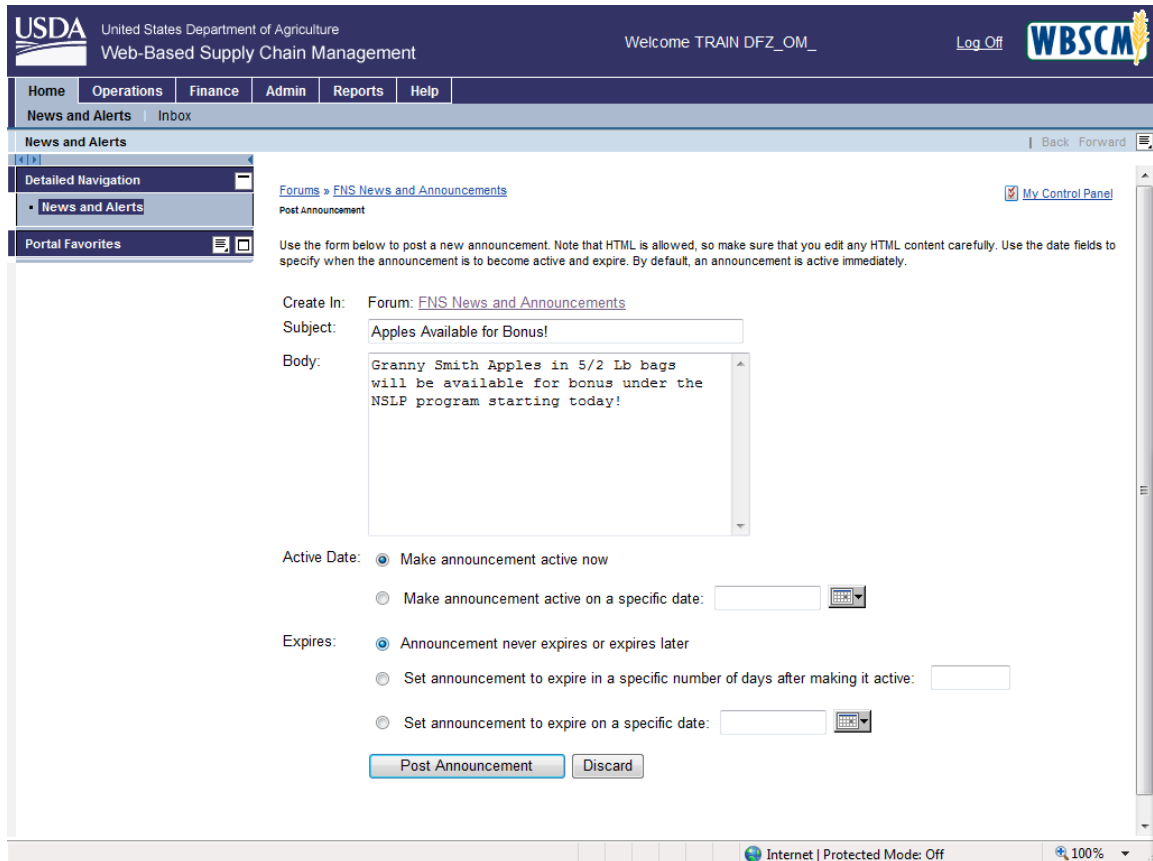
### Forums : Post Announcement Screen

5. Ensure that the **Make announcement active now** radio button is selected to make the announcement active now.



(Note) If desired, you can also choose to make the announcement active starting on a specific date in the future.

## Forums : Post Announcement Screen



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

Welcome TRAIN DFZ\_OM\_ [Log Off](#)

Home Operations Finance Admin Reports Help

News and Alerts | Inbox

News and Alerts [Back](#) [Forward](#)

Detailed Navigation

- News and Alerts

Portal Favorites

[Forums > FNS News and Announcements](#) [My Control Panel](#)

Post Announcement

Use the form below to post a new announcement. Note that HTML is allowed, so make sure that you edit any HTML content carefully. Use the date fields to specify when the announcement is to become active and expire. By default, an announcement is active immediately.

Create In: Forum: [FNS News and Announcements](#)

Subject: Apples Available for Bonus!

Body: Granny Smith Apples in 5/2 Lb bags will be available for bonus under the NSLP program starting today!

Active Date:  Make announcement active now

Make announcement active on a specific date:

Expires:  Announcement never expires or expires later

Set announcement to expire in a specific number of days after making it active:

Set announcement to expire on a specific date:

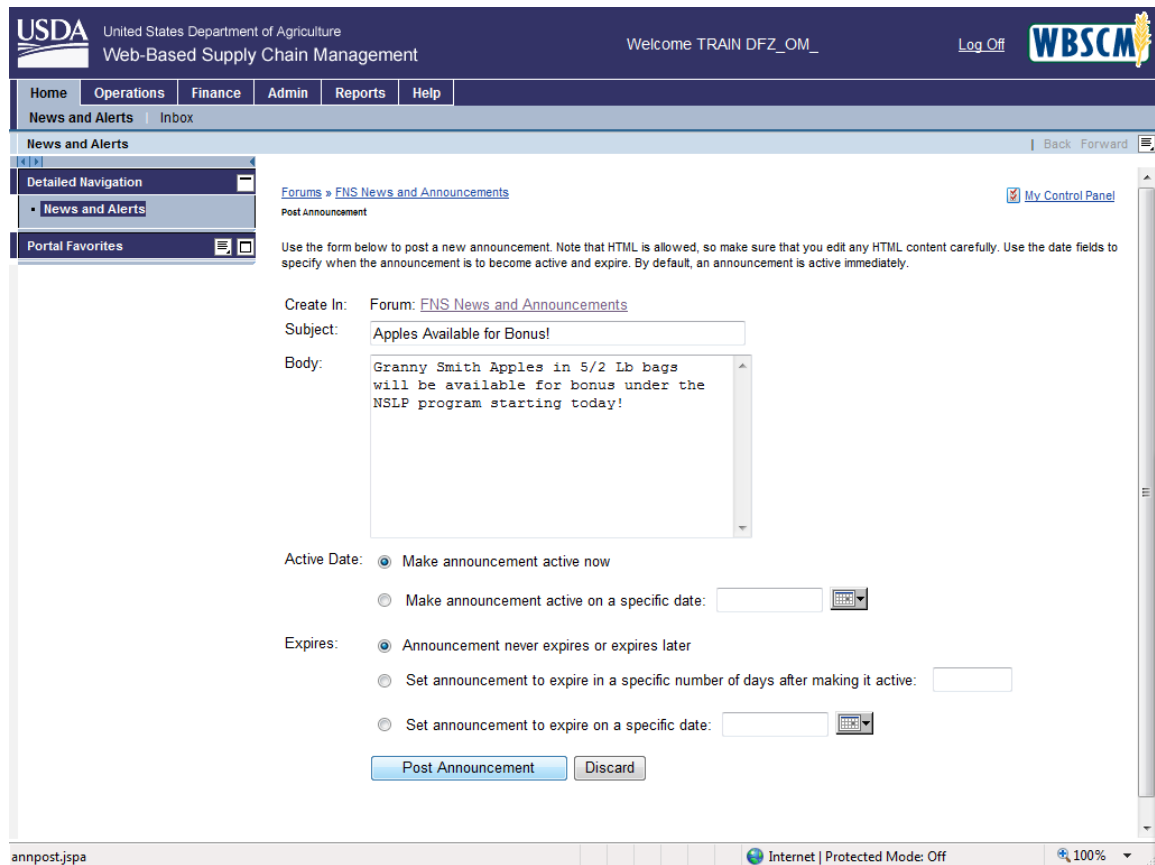
Internet | Protected Mode: Off 100%

6. Ensure the **Announcement never expires or expires later** radio button is selected to allow the announcement to stay active indefinitely until you delete it.



(Note) If desired, you can also set the announcement to expire on a specific date or within a specific number of days.

## Forums : Post Announcement Screen



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

Welcome TRAIN DFZ\_OM\_ Log Off

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Post Announcement

Use the form below to post a new announcement. Note that HTML is allowed, so make sure that you edit any HTML content carefully. Use the date fields to specify when the announcement is to become active and expire. By default, an announcement is active immediately.

Create In: Forum: [FNS News and Announcements](#)

Subject: Apples Available for Bonus!

Body: Granny Smith Apples in 5/2 Lb bags will be available for bonus under the NSLP program starting today!

Active Date:  Make announcement active now

Make announcement active on a specific date:

Expires:  Announcement never expires or expires later

Set announcement to expire in a specific number of days after making it active:

Set announcement to expire on a specific date:

annpost.jspa Internet | Protected Mode: Off 100%

7. Click  (the **Post Announcement** button) to post the announcement.

### Forums : Apples Available for Bonus! Screen

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

Welcome TRAIN DFZ\_OM\_ [Log Off](#)

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- News and Alerts

Portal Favorites

[Forums](#) » [FNS News and Announcements](#) » [Announcement](#) [My Control Panel](#)

Announcement: Apples Available for Bonus!

[Back To Forum](#) [Edit](#) [Expire](#) [Delete](#)

**Announcement: Apples Available for Bonus!**

Posted By: [DFZ\\_OM\\_TRAIN](#)

Created In: Forum: [FNS News and Announcements](#)

Posted: Jun 23, 2010 4:04 PM

Granny Smith Apples in 5/2 Lb bags will be available for bonus under the NSLP program starting today!

<https://wbscmtstweb1.usda.gov/forums/forum.jspa?forumID=2> Internet | Protected Mode: Off 100%

8. You have completed this transaction.



(Note) Notice that your message has been posted.



**RESULT**

The transaction has been successfully completed.

# ***WBSCM User Accessibility Guide***

**Web-Based Supply Chain Management  
(WBSCM)**







Contents

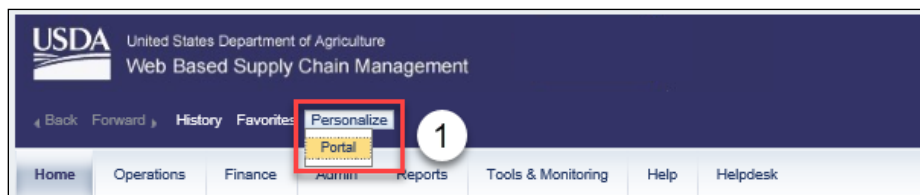
1	Purpose .....	3
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3	Accessibility in WBSCM .....	5
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## 1 Purpose

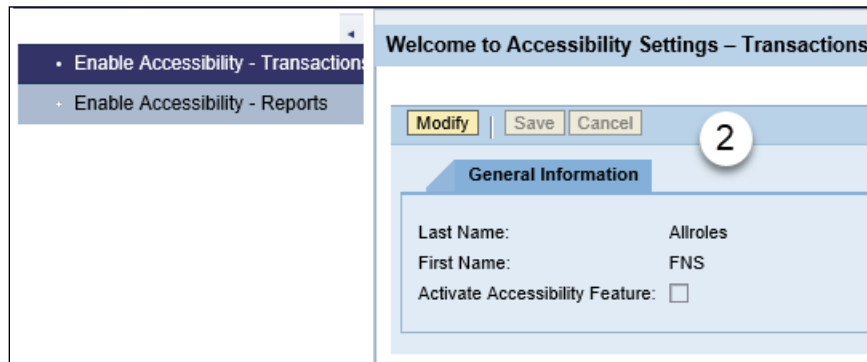
The purpose of this document is to provide guidance for accessibility<sup>1</sup> features in WBSCM. Once activated, users can navigate using the hot keys associated with their preferred screen reader. Additionally, detailed tooltips and instruction boxes, which describe useful hot keys, become available to screen readers. This guide will be updated as accessibility guidelines change, and new methods of conformance are available.

## 2 Set up Accessibility in WBSCM

Users can activate accessibility features from any WBSCM screen as follows:



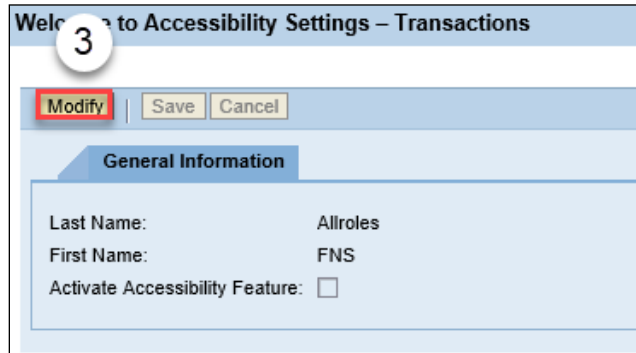
1. Click **Personalize**; then click **Portal** from the drop-down menu.



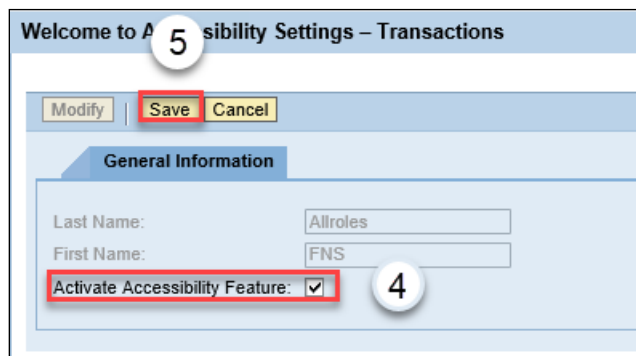
2. Depending on the user's browser and settings, the *Welcome to Accessibility Settings – Transactions* screen may open in a new window or a new tab.

---

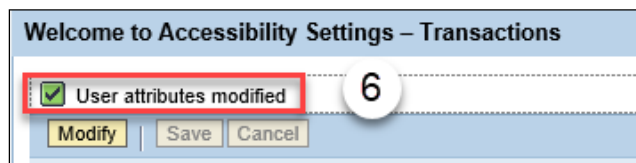
<sup>1</sup> [Section 508](#) of the [US Rehabilitation Act of 1973](#) is the law governing accessibility of electronic and information technology (EIT) in the Federal government to give disabled employees and members of the public access to information comparable to the access available to others. The concept of accessible design and the practice of accessible development ensures both unassisted access and compatibility with assistive technology (e.g., computer screen readers). To conform to the requirements of Section 508, WBSCM is guided by the [Web Content Accessibility Guidelines \(WCAG\) 3.0](#) as well as principles of [Universal Design](#).



- Click **Modify** (the **Modify** button).



- Click **Activate Accessibility Feature:**  (the **Activate Accessibility Feature** checkbox).
- Click **Save** (the **Save** button).



- WBSCM displays the message, *“User attributes modified.”*

**Note:** If the system displays a *“No extension entered”* warning message, the user may disregard it.

- The accessibility feature must be turned on separately for transactions and for reports. Repeat steps 1-6 for the *Enable Accessibility - Reports* option in the *Detailed Navigational Panel*.

- Click (the **Close** button) to close the accessibility settings window or tab.



**Note:** To apply changes, refresh the browser after returning to the WBSCM portal.

If additional assistance is required, contact the WBSCM Help Desk and open an incident.

Phone: 877-WBSCM-4U or 877-927-2648; Email: [WBSCM.servicedesk@CACI.com](mailto:WBSCM.servicedesk@CACI.com)

### 3 Accessibility in WBSCM

WBSCM consists of navigation menus, transactions, and documentation. In general, menus and transactions respond to most screen readers. WBSCM Help documentation responds to a specific set of hot keys, described in [Section 4](#).

#### 3.1 Tips and Tricks

##### 3.1.1 Screen Readers and Keyboard Navigation

Hot keys are used to navigate using a keyboard through the menus and transactions. Hot keys may be associated with a screen reader or an operating system, or they may be customized by individual users. This document does not list all possible hot key menus for a user's individual setup. The table below provides WBSCM hot keys to navigate through the transactions.

Key	Action
F4	Open pop-up for available editable and selection fields for data entry. The user can select from a list of available values, narrow search criteria, or open a calendar to select dates. Press F4 to close the pop-up.  Open drop-down menus from buttons with additional submenu options.
Tab key	Navigate through fields in the main content area, including table data.  Select a row of data in a pop-up.
Arrow keys	Navigate through data in a pop-up, in a table, or read letter by letter, if needed.  Exit a pop-up without data updates.



Key	Action
Enter or Space Bar	Take action using specific buttons and links in main content area and in pop-ups.  An alternative to F4 to open pop-up for certain editable or selection fields, and subsequently to highlight and select values.  Populate selected data value from the pop-up into the selected input field.  Open drop-down menus from buttons with additional submenu options.
F6	Skip through content hierarchy, navigation, and repeated elements on a page in order to land in the main content area for transaction processing.  Skip through blocks of content within the main content area.  Skip through within a pop-up to take final action.
Esc	Exit a pop-up, a menu, or a table without data updates or saving, wherever exit is needed.

- For some screen readers, the user may need to select an item from the drop-down menu to read the selected value.
- Some screen readers do not read certain text elements on the main screen or a pop-up (such as an error message) when navigating using the Tab key; use the right arrow button on the keyboard instead.
- **Using advanced screen readers such as JAWS may alleviate some of the issues listed above. WBSCM is tested using Narrator and NVDA.**

### 3.1.2 Other Tips

- WBSCM offers a universal search field at the top of the WBSCM Home page to search for WBSCM transactions. Users can enter keywords in the search field and click the **Search** icon to directly navigate to a specific WBSCM transaction.
- When entering dates in WBSCM, use the MM/DD/YYYY (two-digit month, slash, two-digit day, slash, four-digit year) format for best results.

## 4 WBSCM Help Documentation Accessibility

WBSCM documentation is available through third-party software in multiple formats, including HTML, Microsoft Word, and Adobe PDF. For best results, select the HTML format (default), which is most conformant with Section 508 guidelines.



Requests for alternative formats can be made through the WBSCM Help Desk.

#### 4.1 Navigating to a Document

When accessing WBSCM work instructions and quick reference guides, use standard hot keys to navigate to the HTML document.

#### 4.2 Navigating within a Document

WBSCM allows users to navigate to Help documentation using their own screen reader hot keys. Additionally, use the following hot keys within both the document menu and document content.

To navigate through the document menu:

Key	Action
Enter	Move to the selected page from the menu navigation.
Tab	Advance to the next section in the menu navigation.
Shift & Tab	Advance to the previous section in the menu navigation.

To navigate within the document content:

Key	Action
Tab	Advance to the next document section.
Shift & Tab	Advance to the previous document section.
Ctrl & +	Increase the text size.
Ctrl & -	Decrease the text size.
Ctrl & 0	Reset the text size.

#### 4.3 Simulation Navigation

Each Help document has an associated simulation. Simulations allow users to navigate through a transaction without entering actual data in WBSCM. Simulations have their own navigation keys.

Use the following keys to navigate through a simulation in Auto Playback mode:

Key	Action
Enter	Navigate to the selected step in the step window.
Right Arrow	Open the next step in the step window or open the next page.
Left Arrow	Open the previous step in the step window or open the previous page.
M	Toggle the step window.
T	Toggle the transcript pane.
Ctrl & +	Increase the text size.
Ctrl & -	Decrease the text size.
Ctrl & 0	Reset the text size.



#### 4.4 Course Navigation

Some transactions in WBSCM have associated eLearning courses available through the Help menu. When WBSCM accessibility is activated, course menus are navigable using the following keyboard commands:

Key	Action
Enter or Spacebar	Move to the selected page from the menu navigation.
Right Arrow	Open submenu items.
Left Arrow	Close submenu items.
Up Arrow	Navigate to the parent of the current menu option.
Tab	Advance to the next section in the menu navigation.

Once a course has been selected from the Course menu, use the following keys to navigate through an individual course:

Key	Action
Right Arrow	Open next page.  By default, the focus is on the Next button, allowing the user to click Enter or spacebar to move through the course.
Left Arrow	Open previous page.
Tab	Advance to the next course section.
M	Toggle the Menu.
H	Toggle the History.
T	Toggle transcript pane.
Ctrl & +	Increase text size.
Ctrl & -	Decrease text size.
Ctrl & 0	Reset the text size.
Escape	Exit course.
Tab / Tab & Shift	<b>Drag and Drop:</b> Press the Tab key to move between draggable elements and click Spacebar or Enter to “pick up” a draggable element. Then, press the Tab key to select a target. Click Spacebar or Enter to drop the element on that target. Once complete, press the Tab key to move focus directly to the Continue button.  <b>Multiple Choice:</b> Press the Tab key to enter the radio button group, if it is not already focused. Click the Up/Down Arrow keys to move the selection between radio button choices. Once a selection is made, press the Tab key to move focus directly on the Continue button.  <b>Multiple Correct:</b> Press the Tab key to move between checkboxes. Click Spacebar to select or deselect the choices. Once all selections have been made, press the Tab key to move focus directly to the Continue button.



## 5 Open Accessibility Issues

Improving accessibility of the WBSCM system and associated help documentation is an ongoing effort. However, with changing requirements and dependency on interaction with third-party software(s), users may experience some of the following outstanding issues. In most cases, third-party vendor tickets have been opened with ANCILE uPerform and SAP.

### 5.1 WBSCM Help Documentation – Open Issues

- The [language metadata tag](#) is not established for HTML outputs.
- Images may not be fully legible at [200% magnification](#).
- WBSCM transactions, simulations, and documents depend on [cascading style sheets \(CSS\)](#) and may not fully render when CSSs are removed.
- WBSCM documentation is dependent on the WBSCM Portal system time out rules. Help documentation [may time out without notice](#) if/when users' session times out in WBSCM.
- WBSCM eLearning courses do not have [<h1> element](#).
- WBSCM eLearning courses do not have [Skip links](#).

### 5.2 WBSCM Application – Open Issues

- Screen reader issues with certain tools reading select user interface components such as Page titles, Table titles, Column titles.
- Screen reader may not read items in drop-down fields when using the Tab key. Refer to the tip in [Section 3.1.1](#).
- Screen reader may not read certain text elements such as an Error message on the main screen or a pop-up when using the Tab key. Refer to the tip in [Section 3.1.1](#).

## 6 WBSCM Terms and Acronyms

The table below includes a list of terms and acronyms and their short descriptions generally useful in the context of WBSCM and its use by USDA, USAID, and all user groups. These acronyms may be useful when navigating within WBSCM.

Acronym	Description
AA	Account Assignment
ACDA	American Commodity Distribution Association
ADA	Americans with Disabilities Act
AIS	Automated Inventory System
ALM	Application Lifecycle Management
AMS	Agricultural Marketing Service
APHIS	Animal and Plant Health Inspection Service
ASN	Advance Shipping Notification





<b>Acronym</b>	<b>Description</b>
AVC	Availability Control
BBB	Build Back Better Initiative
BEOS	Bid Evaluation Optimization Solution
BI	Business Intelligence
BMI	Business Management Improvement
BP	Business Partner
CACFP	Child and Adult Care Food Program
CACI International Inc.	Prime contractor for the WBSCM Program
CARE	Cooperative for Assistance and Relief Everywhere
CBO	Country Backstop Officer (International Ordering)
CCB	Change Control Board
CCC	Commodity Credit Corp
CCR	Central Contractor Registration
ChaRM	Change Request Management
COR	Contracting Officer Representative
COSUP	Covid Supplemental Assistance
CR	Change Request
CRM	Customer Relationship Management
CS	Case (See also UoM)
CSFP	Commodity Supplemental Food Program
CSR	Country Specific Requirements
DA	Disaster Assistance
DATA Act	Digital Accountability and Transparency Act of 2014
DLA	Defense Logistics Agency
DMS	Document Management System
DOD	Department of Defense
DPM	Deputy Program Manager
DRB	Defect Review Board
DUNS	Dun & Bradstreet Number System
E2E	End-to-End Visibility (International Commodity Shipments)
EC	Executive Committee
ECC	ERP Central Component
EDC	Encourage Domestic Consumption
EDI	Electronic Data Interchange
eINV	Electronic Invoicing
EIT	Electronic and Information Technology
ERP	Enterprise Resource Planning
FAS	Foreign Agricultural Service
FC	Funds Commitment



<b>Acronym</b>	<b>Description</b>
FDA	Food and Drug Administration
FDPIR	Food Distribution Program on Indian Reservations
FPDS	Federal Procurement Data System
FEDSIM	Federal Systems Integration and Management Center
FEMA	Federal Emergency Management Agency
FFAVORS	Fresh Fruit and Vegetable Order Receipt System
FFFB	Farmers to Families Food Box
FFP/BHA	Food for Peace / Bureau for Humanitarian Assistance
FIN	Finance
FIPS	Federal Information Processing Standards
FM	Funds Management
FMBB	Funds Management Budgeting Workbench (specific SAP module)
FMMI	Financial Management Modernization Initiative
FNS	Food and Nutrition Service
FOIA	Freedom of Information Act
FPAC	Farm Production and Conservation
FPRS	Food Program Reporting System
FS	Financial Services
FSA	Farm Service Agency
FSIS	Food Safety and Inspection Service
FUL	Fulfillment
GAL	Gallon (See also UoM)
GIPSA	Grain Inspection, Packers, and Stockyards Administration
GMin	Guaranteed Minimums
GR	Goods Receipt (also called Shipment Receipt in WBSCM)
GSA	General Services Administration
HANA	High-Performance Analytic Appliance
IFMS	Integrated Food Management System
IR	Invoice Receipt
ITO	Indian Tribal Organization
JA	Job Aid
KM	Knowledge Management
LIQ	Liquidated Value Adjustments
LOI	List of Invoices reports
LRP	Local and Regional Food Aid Procurement Program
MARAD	Maritime Administration
MOU	Mass Order Update
MRP IT	Marketing and Regulatory Programs Information Technology
MT	Metric Ton (See also UoM)



<b>Acronym</b>	<b>Description</b>
NAFDPIR	National Association of Food Distribution Programs on Indian Reservations
NAICS	North American Industry Classification System
NGO	Non-governmental Organization
NPS	National Payment Services
NRRS	National Receipts and Receivables System
NSLP	National School Lunch Program
NW	National Warehouse
O&M	Operations and Maintenance
OCFO	Office of the Chief Financial Officer
OCIO	Office of the Chief Information Officer
OCM	Organizational Change Management
OCN	Order Change Notification
OMB	Office of Management and Budget
PCA	Procurement Contract Award
PM	Program Manager
PMO	Program Management Office
PMT	Program Management Team
PNR	Problem Notification Report
PO	Purchase Order
PoP	Period of Performance
PPA	Prompt Pay Act
PR	Purchase Requisition/Request
PRO	Procurement
PVO	Private Voluntary Organization
QM	Quality Management Value Adjustments
RA	Recipient Agency
RCN	Requisition Change Notification
SAC	SAP Analytics Cloud
SAM	System for Award Management
SAP	Systems Applications and Products
SDA	State Distributing Agency
SDVOSB	Service-disabled Veteran-owned Small Business
SEPDS	Summary End Product Data Schedules
SFSP	Summer Food Service Program
SKA	Skills, Knowledge, and Abilities
SME	Subject Matter Expert
SO	Sales Order
SolMan	Solution Manager
SRM	Supplier Relationship Management



<b>Acronym</b>	<b>Description</b>
SSO	Single Sign On
TEFAP	The Emergency Food Assistance Program
TM	Trade Mitigation
TPOC	Technical Point of Contact
UEI	Unique Entity Identifier
UoM	Unit of Measure
URI	Unique Request Identifier
USAID	United States Agency for International Development
USDA	United States Department of Agriculture