WBSCM User Administration Job Aid

(Not intended for Corporate Vendor Administrators)

New User Creation Process in WBSCM

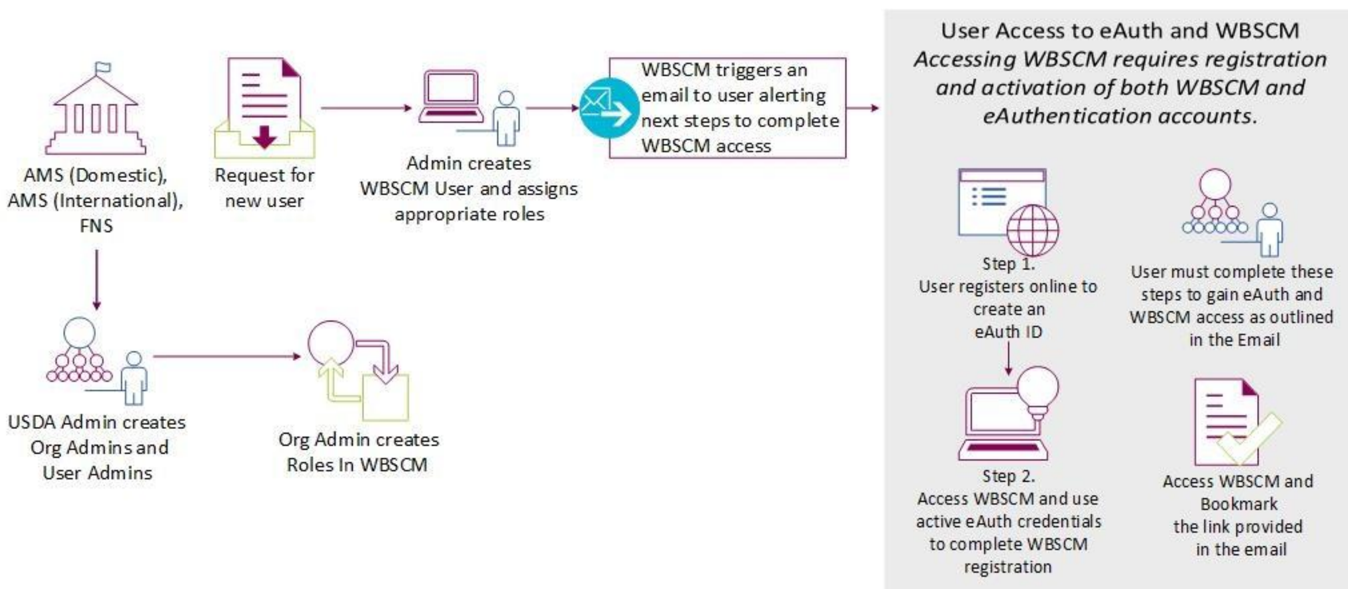
This job aid provides an overview of the WBSCM new user creation process, the USDA WBSCM organization and sub-organization structure, and the differences between an Organization Administrator (Org Admin) and a User Administrator (User Admin).

Access to WBSCM requires:

(1) The User Admin/Org Admin creates a new user profile under the applicable organization within the WBSCM application. In some cases, this also includes setting up a new sub-organization.

(2) The new user sets up login credentials through USDA eAuthentication (eAuth) and registers this eAuth account to their WBSCM user profile. Instructions are provided to a new user by email notification when the WBSCM user profile is created. Refer to the eAuthentication Tips and Support job aid for more information.

Note: Detailed work instructions are available for Create User and Display and Maintain User. Similar instructions for vendor user administration are also available for Create User – Vendor and Display and Maintain User – Vendor . A list of roles available for assignment to each type of admin and organization are provided in the WBSCM Role Assignment Matrix.



USDA Organizations and Sub-organizations in WBSCM

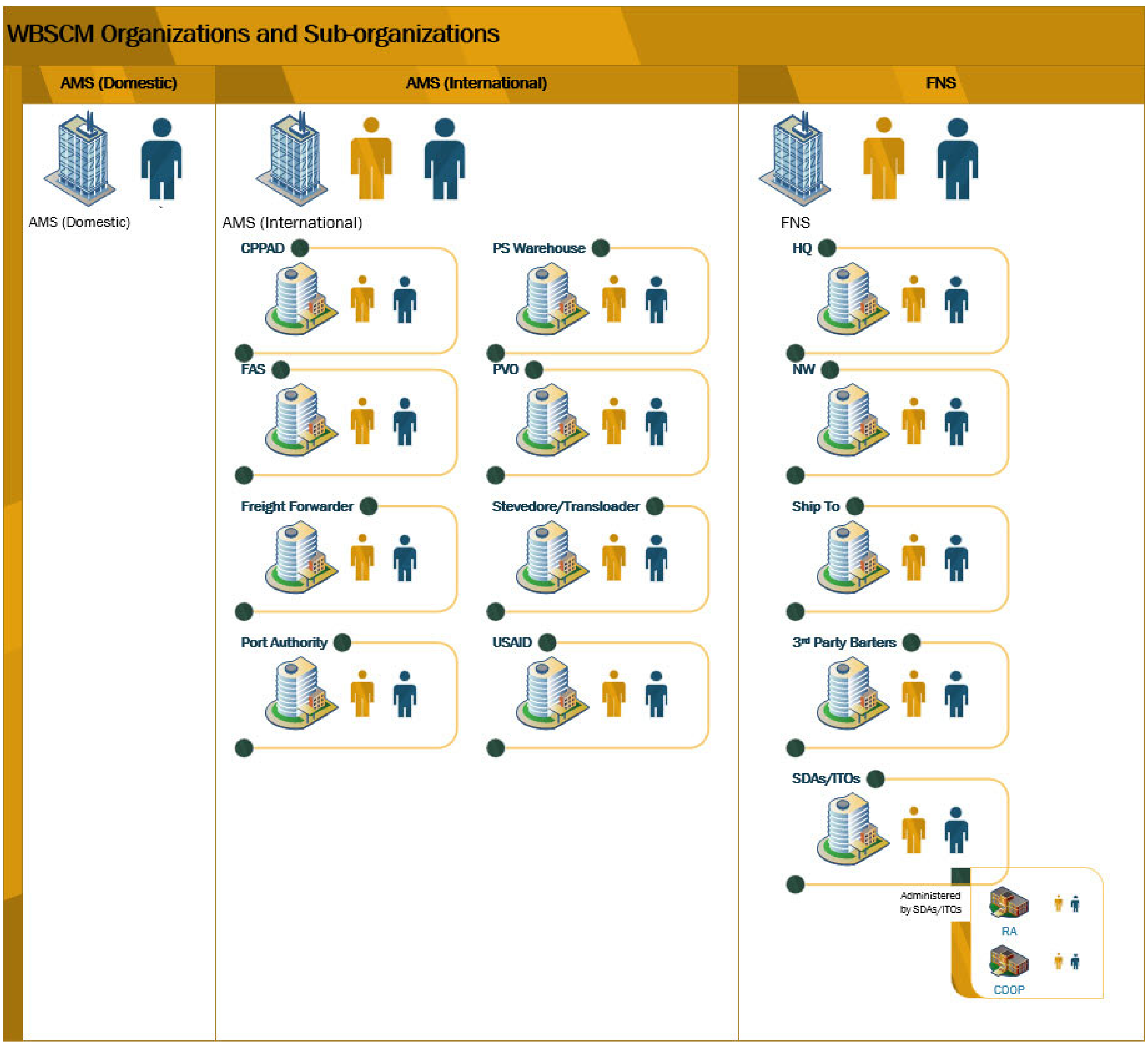
Every WBSCM user is assigned to a USDA organization and/or a sub-organization. Based on the organization/sub-organization assignment, new users are assigned one or more roles, which determines their level of access to WBSCM functions.

There are two types of administrators:

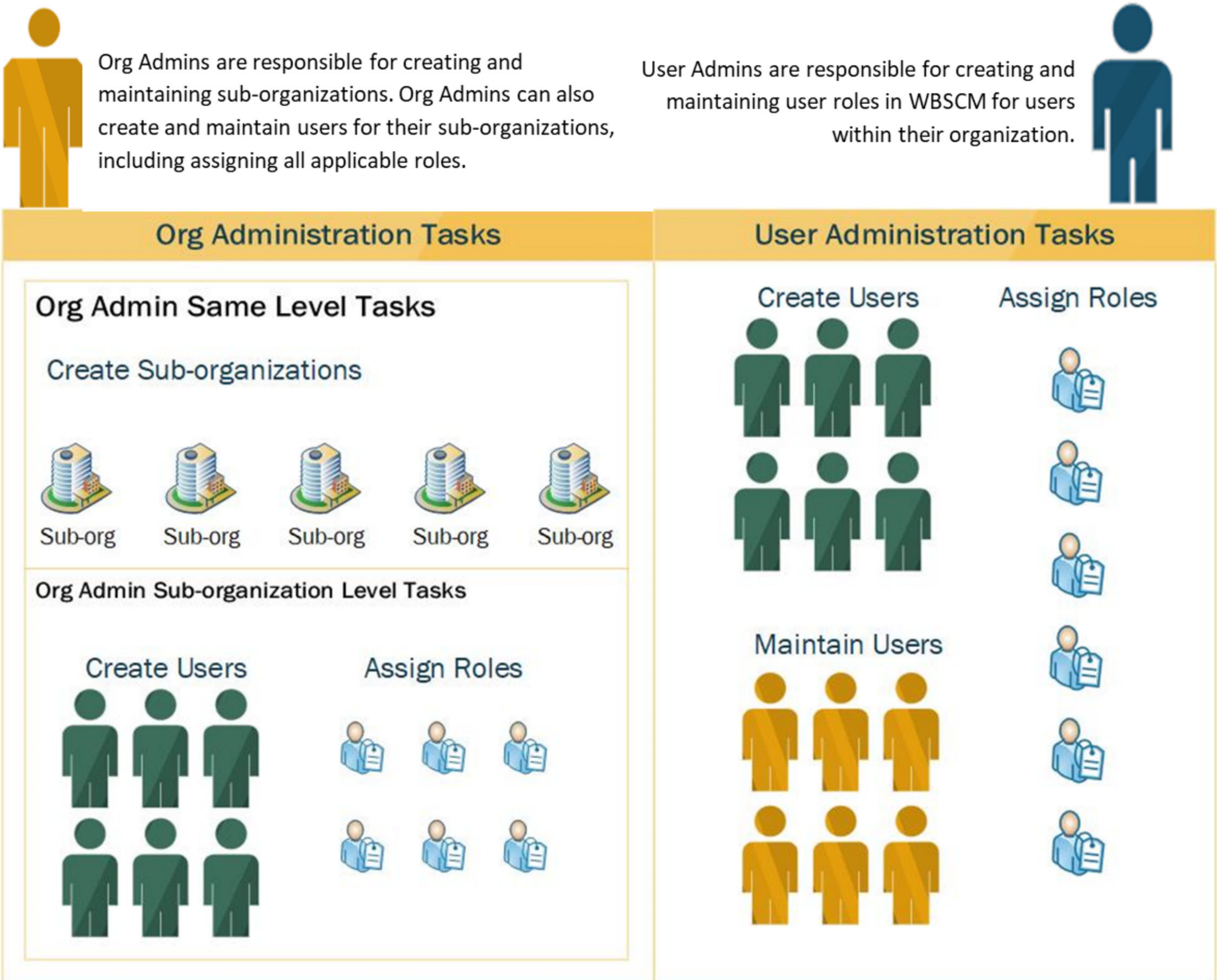
1. **Org Admin**: creates and maintains organization and its sub-organizations; creates and maintains users for its sub-organizations
2. **User Admin**: creates and maintains users for their own organization

Note: To manage users for both their own organization and its sub-organizations, both the User Admin and Org Admin roles must be assigned.

The illustration below displays the relationship between organizations and sub-organizations in WBSCM and what administrative roles are available. Refer to the [WBSCM Role Assignment Matrix](#) for a complete list of roles available for each type of organization.



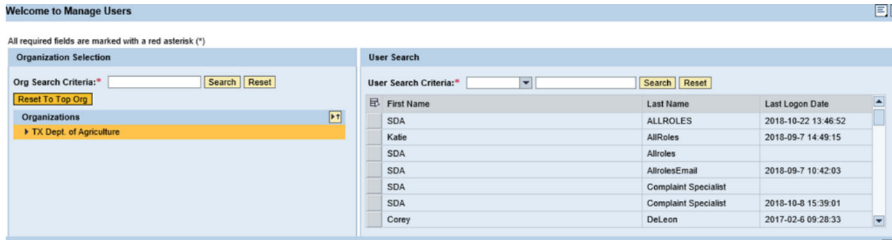
Organization and User Administrators



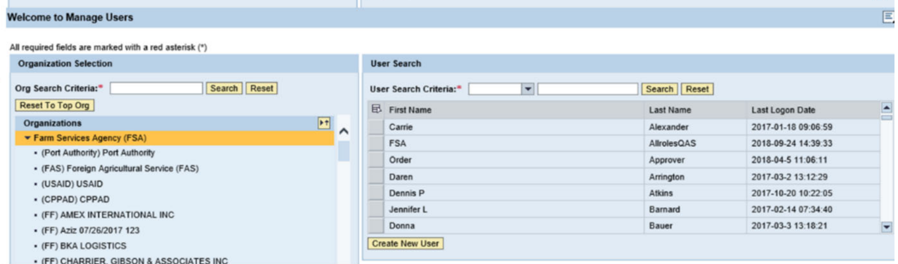
Org Admin: Create User Tasks

In WBSCM, User Admins can see users for their own organization and its sub-organizations only. Org Admins see their organization and its relationship to sub-organizations in the left-hand panel of the ***WBSCM Admin ➔ Manage Users ➔ Manage Users*** screen. Refer to the [Create User](#)work instruction for detailed step-by-step instructions.

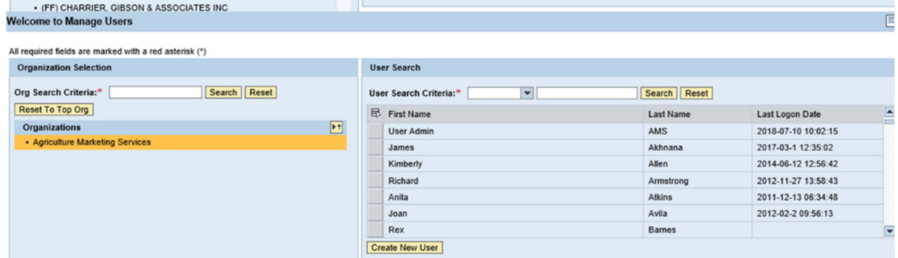
This example on the right from FNS displays an **SDA Org Admin** view for the Texas Department of Agriculture with their Recipient Agency (RA) and Co-op sub-organizations.



This example on the right from AMS displays an **AMS – INTL Org Admin** view with its various sub-organizations such as Port Authority, Freight Forwarders, FAS, and USAID.

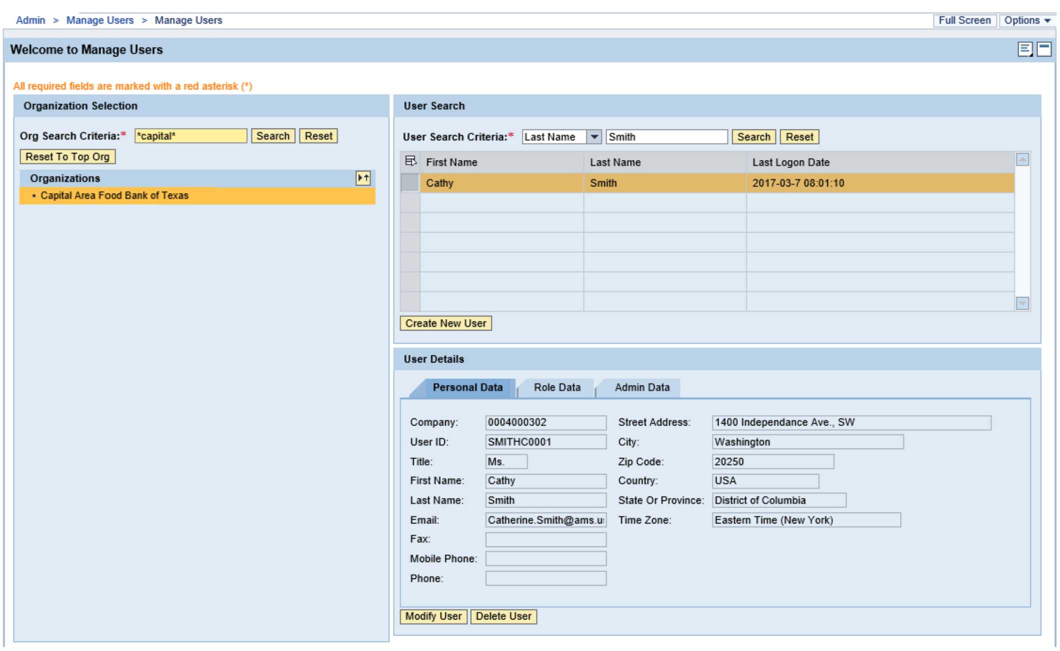


This example on the right from AMS displays an **AMS – DOMESTIC Admin** view. AMS – Domestic does not use sub-organizations.



User Admin: Maintain User Tasks

In WBSCM, User Admins perform tasks such as updating personal data, adding or removing roles, and locking or unlocking users in their organizations. Generally, Org Admins do not perform user maintenance for their sub-organizations unless a User Admin for that organization is not assigned or active; for example, they may assign missing roles or resend the new user registration email for sub-organization users.



User Admin: Maintain User Details

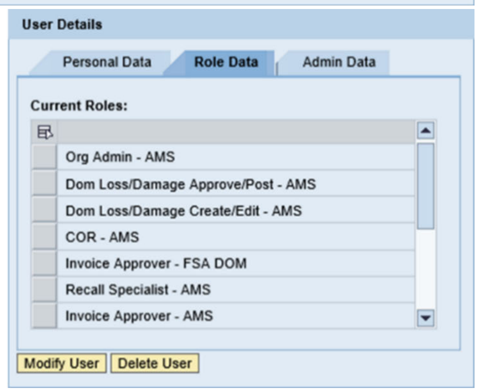
Once a user has been selected within the WBSCM **Admin ➔ Manage Users ➔ Manage Users** transaction, the user record is displayed in the User Details section on three tabs: Personal Data, Role Data, and Admin Data. Refer to the Display and Maintain User work instruction for detailed step-by-step instructions.

Update Personal Data:

- Update First and Last Name
- Email Address
- Title
- Address
- Phone Numbers

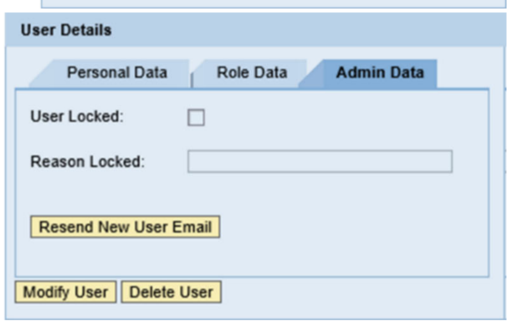
Update Role Assignment:

- Add Roles based on appropriate job function
- Remove Roles when access is no longer required



Lock or Delete User:

- Lock or unlock user as per your organization business process
- Delete a user – option available once you save the record
- Resend new user registration email



Need Help?

Access all Help documentation on the WBSCM Portal under the ***Help*** tab ➔ ***Training*** sub-tab. Utilize the links in this job aid to review detailed step-by-step instructions. For further help, please email the WBSCM Service Desk at WBSCM.servicedesk@CACI.com or call 877-WBSCM-4U (877-927-2648).

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for Organization (Org) and User Administrators (Admins) to create a new user in WBSCM. Admins will be able to create a new user and assign security roles in their organization or sub-organization as follows:

- Org Admins can create any user in their sub-organizations.
- User Admins can create or update users only in their own organization.

After following these steps to create a new user, the new user will receive instructions to set up an eAuth ID and login to WBSCM using eAuthentication (eAuth). The new user will then be asked to accept the rules of behavior upon their initial login to WBSCM.

Process Trigger

Use this procedure to create a new user in WBSCM.

Prerequisites

- User performing this transaction must have the Org or User Admin role.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab ➔ **Manage Users** tab ➔ **Manage Users** link to go to the *Manage Users* screen.

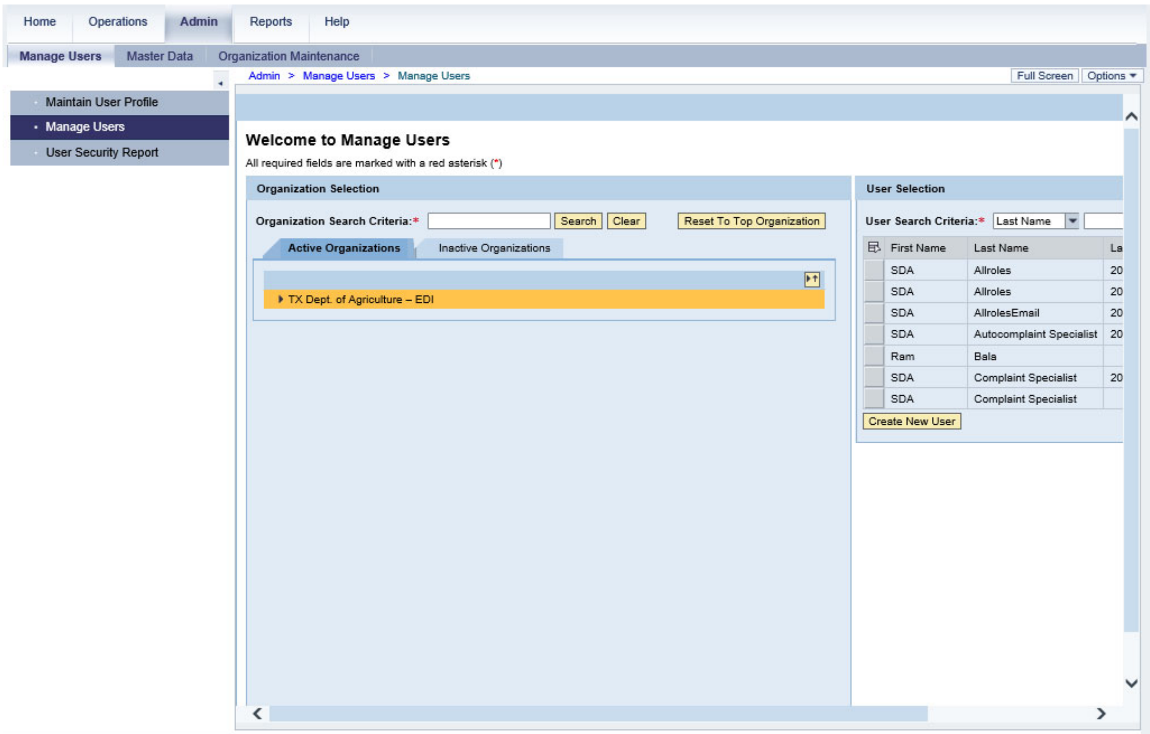
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
    - **Required (R)** – a mandatory field necessary to complete the transaction.
    - **Optional (O)** – a non-mandatory field not required to complete the transaction.
    - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigational training and tips on creating favorites, performing searches, etc.
- If the user is a Corporate Vendor Administrator (CVA) and needs to create users for their own organization, refer to the *Create User (Vendor)* work instruction.
- Refer to the **WBSCM User Administration** job aid for an overview of the User Administration process.

PROCEDURE

1. Start the transaction using the following Portal path: **Admin** tab ➔ **Manage Users** tab ➔ **Manage Users** link.

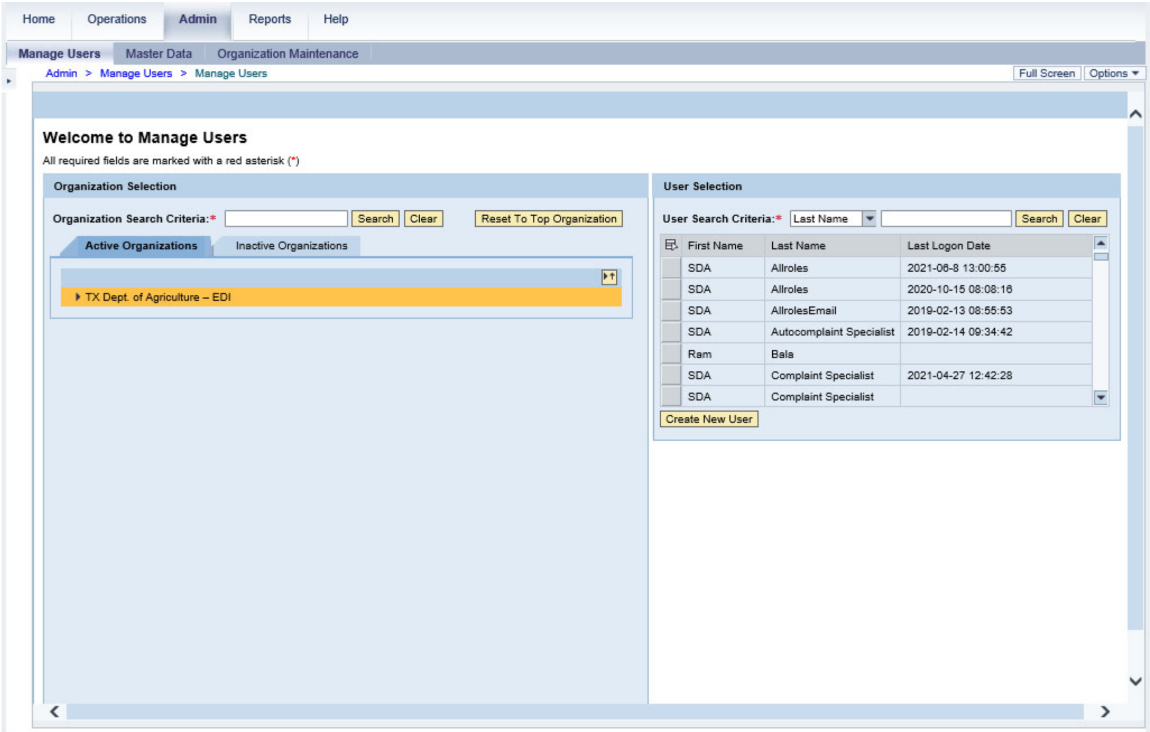
Image: Manage Users Screen



2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

(Note) The *Manage Users* screen content depends on the assigned role(s). For Org Admins, the organization and sub-organization(s) are listed in the *Organizations* panel on the left. For both Org Admins and User Admins, user details are listed in the *User Search* panel on the right.

Image: Manage Users Screen

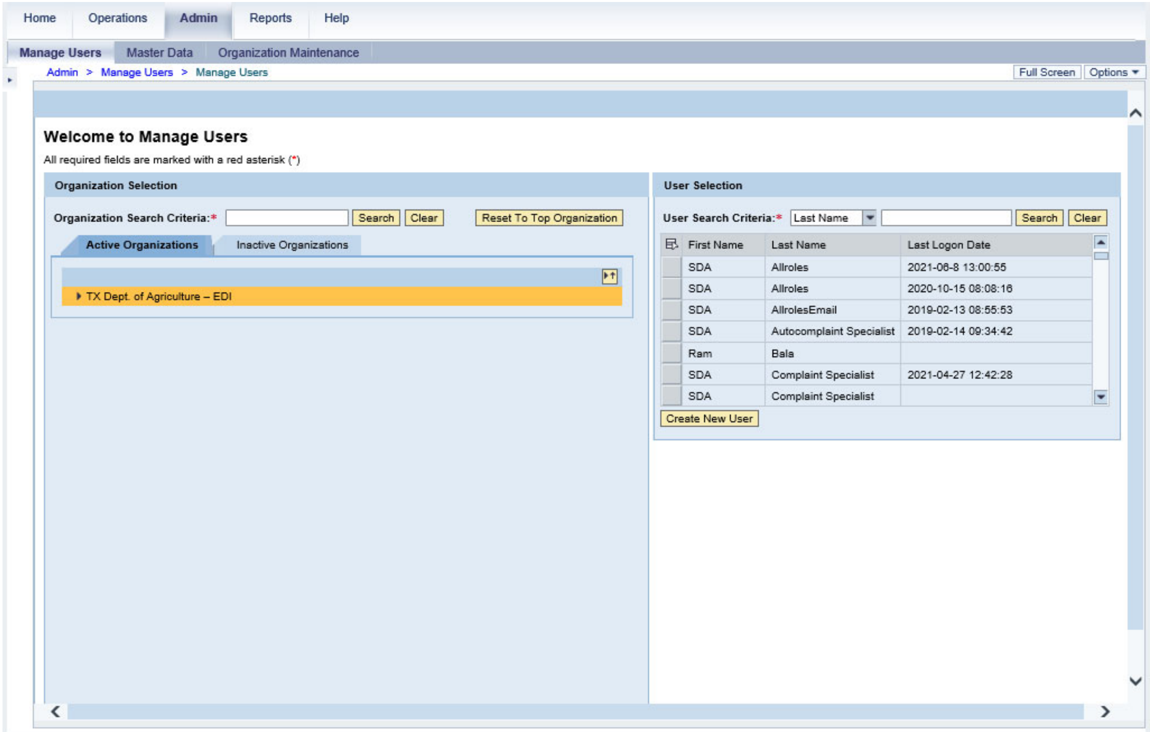


3. Perform one of the following:

If	Then
Admin needs to create a new user for a sub-organization.	Go to Step 4.
Admin needs to create a new user for own organization.	Go to Step 8.

(Note) Only an Org Admin for USDA agencies or SDAs/ITOs can create new users for their sub-organizations. Other Admins can create new users for their own organization only.

Image: Manage Users Screen



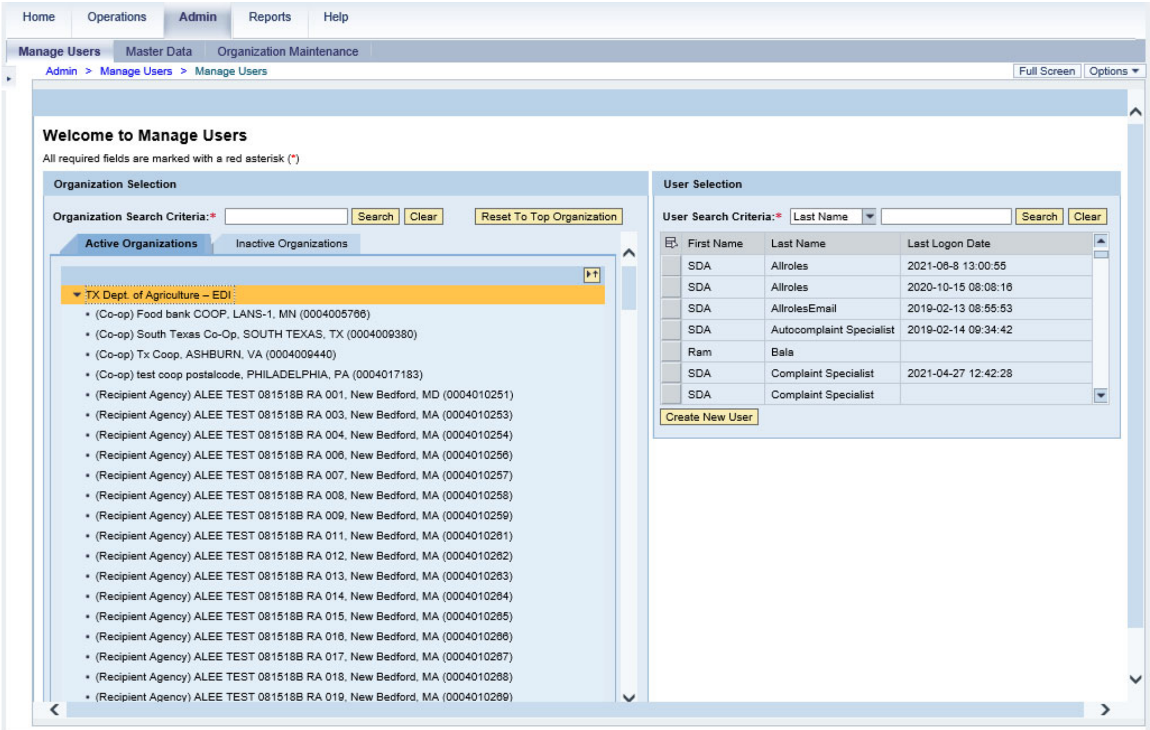
4. Click (the **Available Organizations** arrow) next to the tree item at the top of the *Organization Selection* panel.

(Note) The sub-organizations listed in the *Organizations Selection* panel for each type of organization include:

- **FSA** - Vendor and other sub-organizations (USAID, FAS, CPPAD, Private Voluntary Organizations (PVOs), Stevedores, and Freight Forwarders)
- **AMS** - Vendors
- **FNS** - Dom Ship-tos, HQ Receiver, National WH (Warehouses), SDA, and Third Party Barter (SEAM)
- **SDA** - Co-Ops and Recipient Agency
- **Co-Op** - Recipient Agency
- **Recipient Agency** - No sub-organizations
- **HQ Receivers** - Dom Ship-to
- **Dom Ship-to** - No sub-organizations
- **National WH** - No sub-organizations

(Note) In the *Organization Selection* panel, for each organization, the **Active Organizations** and **Inactive Organizations** tabs display is dependent on the sub-organization status. For example, if an organization only has active sub-organizations, then only the **Active Organizations** tab will display and the **Inactive Organizations** tab will be hidden. In this example, the organization has both active and inactive sub-organizations, therefore both **Active Organizations** and **Inactive Organizations** tabs are displayed.

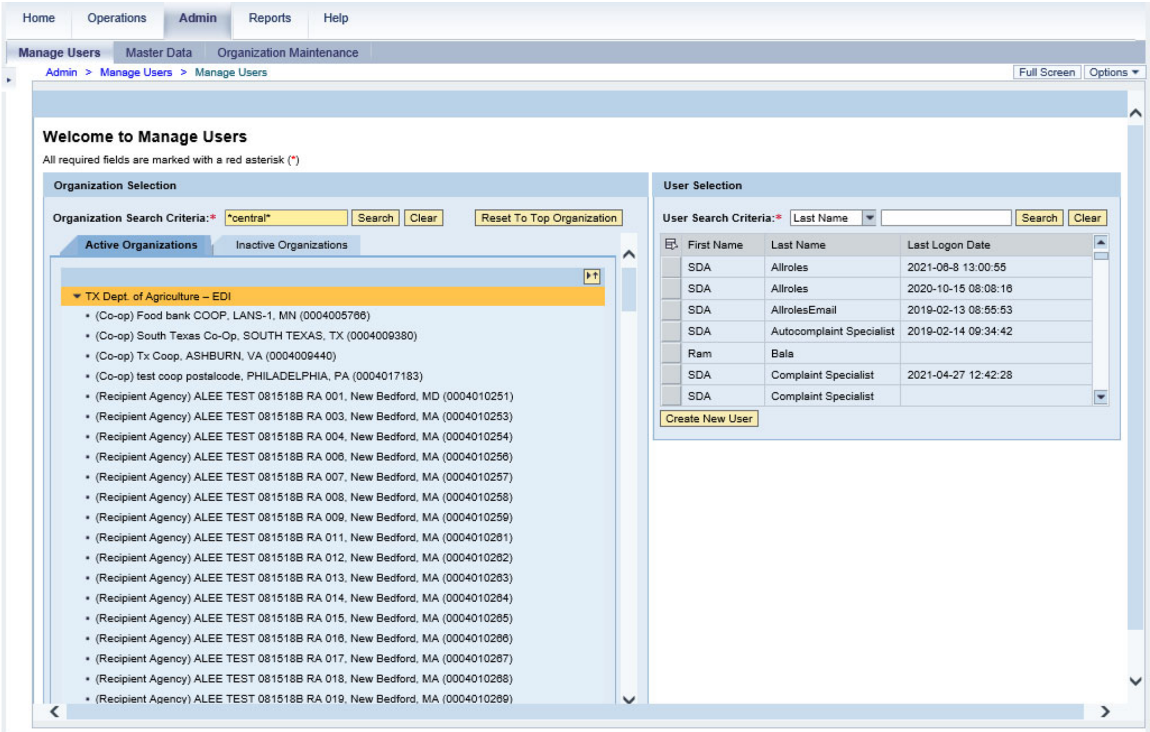
Image: Manage Users Screen



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

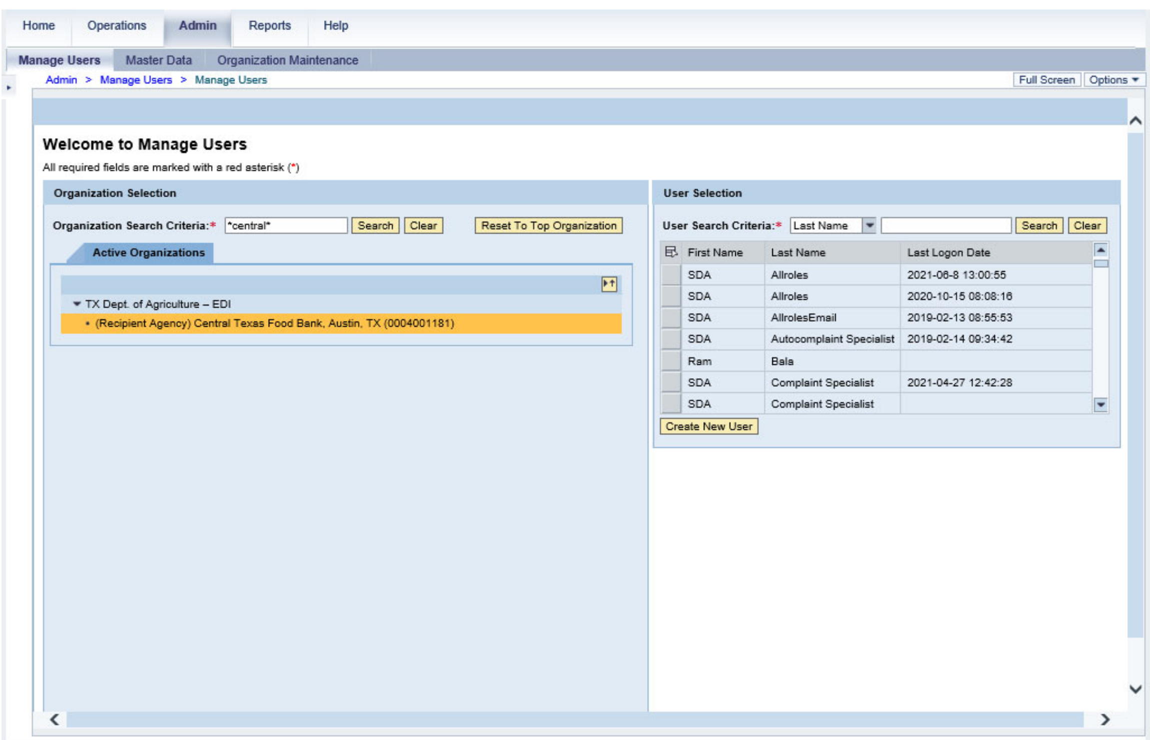
Field	R/O/C	Description
Organization Search Criteria	R	Field on a WBSCM screen used to define the criteria for a search. **Example:** *central* (Note) Use the wildcard symbol to search part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

Image: Manage Users Screen



6. Click Search (the **Search** button) to search for the matching sub-organization(s).

Image: Manage Users Screen



7. Select the appropriate sub-organization in the *Organization Selection* panel.

(Note) The users for the selected sub-organization will display in the *Users Search* panel.

(Note) Org Admins should confirm that the correct organization is selected in the *Organizations Selection* panel on the left. To return to the top-most organization, click Reset To Top Organization (the **Reset to Top Organization** button).

8. Perform one of the following:

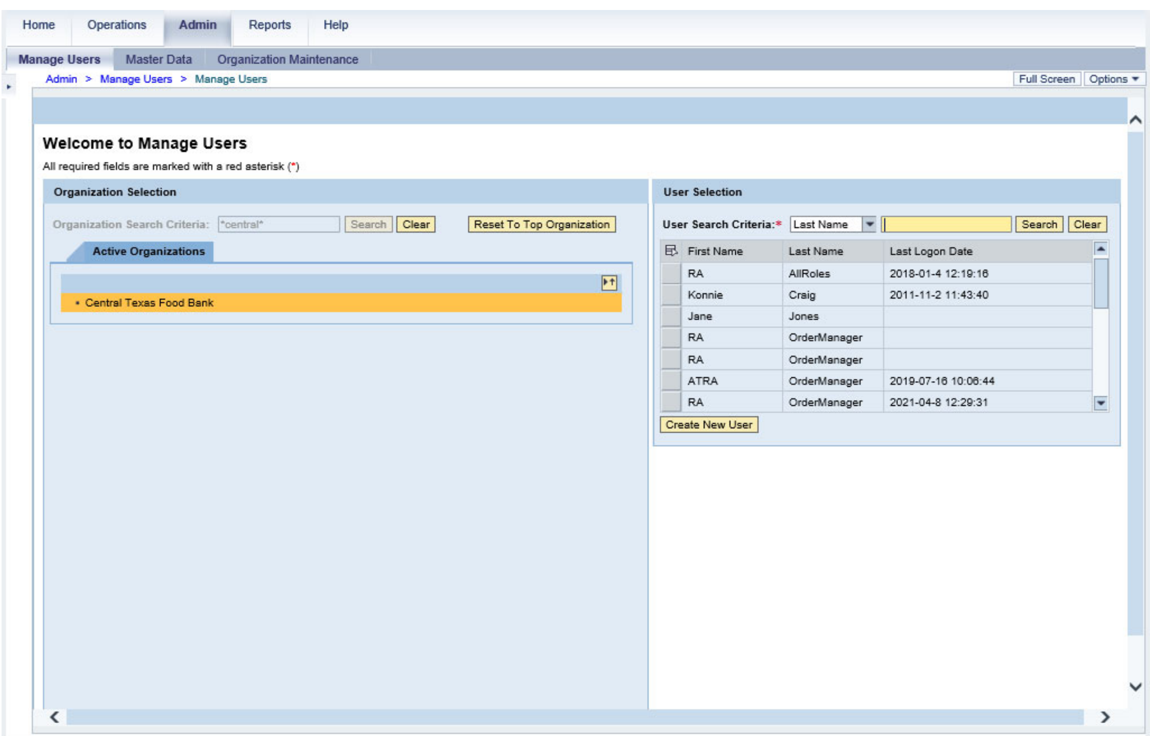
If	Then
Admin needs to search for an existing user by last name	Enter the Last name in the **User Search Criteria** field. Last Name (the **Last Name** option) is the default option.
Admin needs to search for an existing user by first name	Click First Name (the **First Name** option) from the **User Search Criteria** drop-down.

(Note) In this example, the **Central Texas Food Bank** has an active organization; therefore only the **Active Organizations** tab displays.

(Note) To prevent creating duplicate user profiles for the same person, always perform a user search to ensure that a user profile does not already exist in WBSCM.

(Note) **Last Name** is the default option for the **User Search Criteria** field. The user can select the **First Name** as a search option by clicking on (the **drop-down** arrow) and select **First Name** from the option list. In this example, **Last Name** is used.

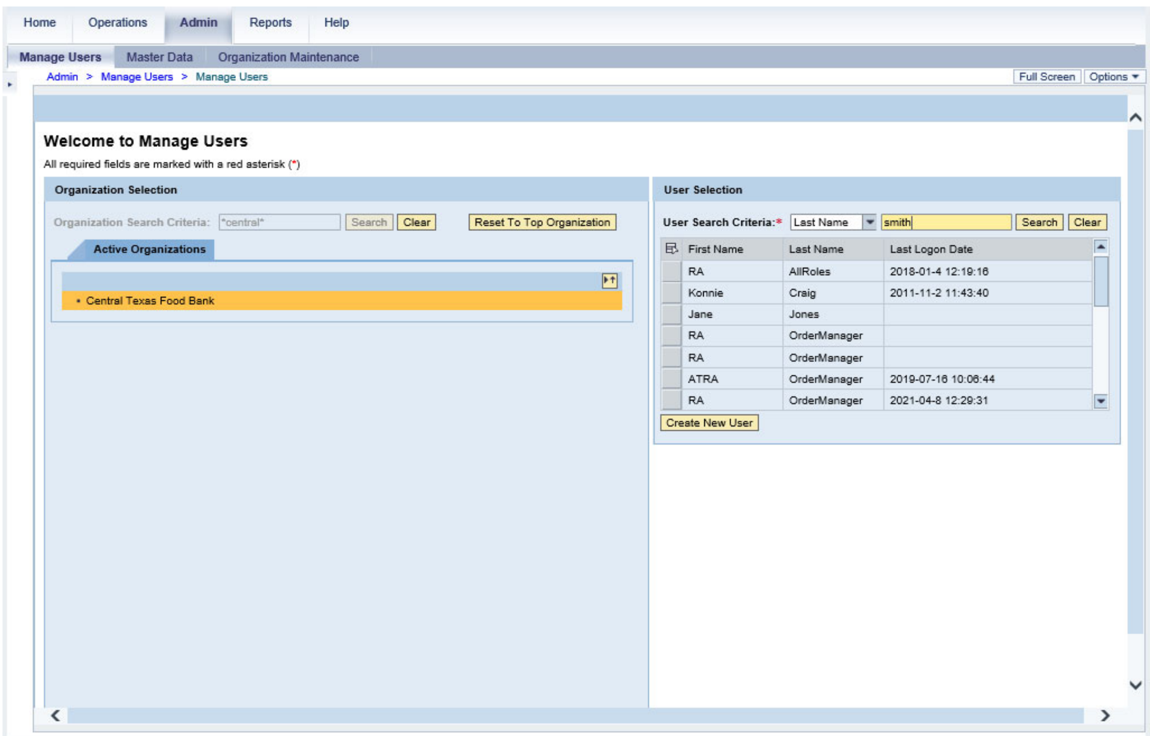
Image: Manage Users Screen



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

Field	R/O/C	Description
User Search Criteria: (Value)	R	First name or last name of the user to locate. **Example:** smith (Note) Enter the name or use the wildcard symbol to match part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

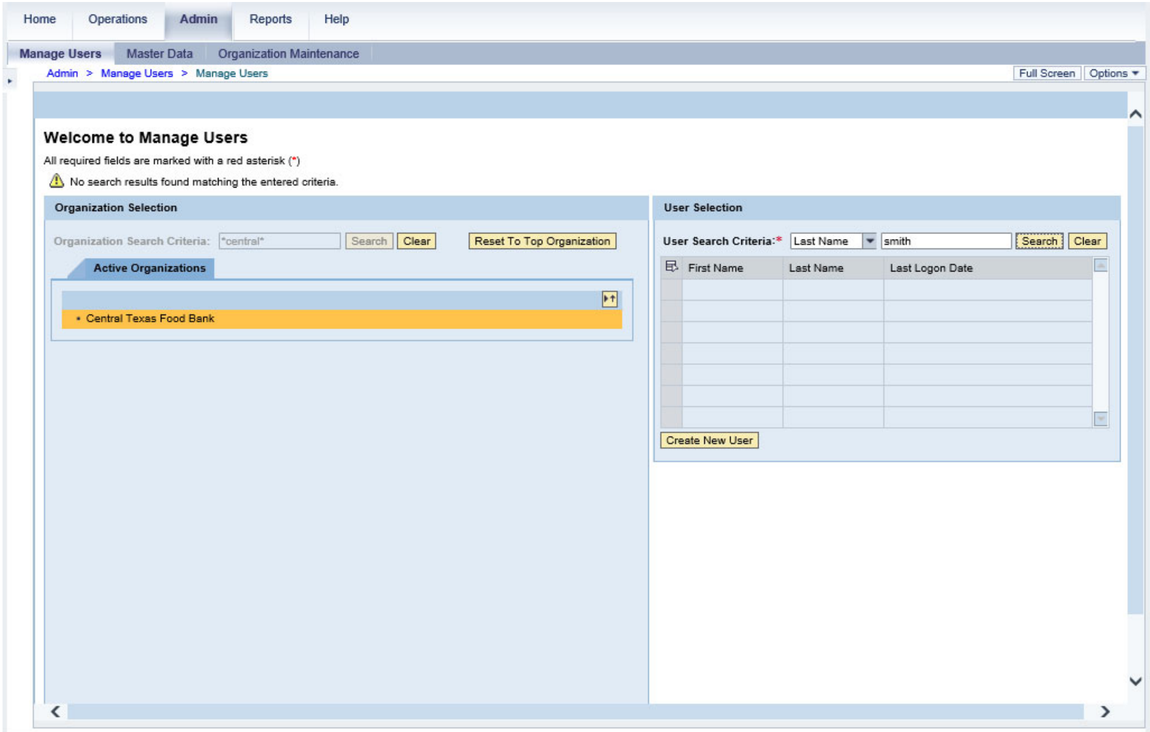
Image: Manage Users Screen



10. Click Search (the **Search** button) to check for matching user profile(s) in WBSCM.

(Note) If the user already exists for the selected organization, do not continue with the steps to create a new user. Refer to the *Display and Maintain User* work instruction for guidance on reviewing and updating the existing user profile, as needed.

Image: Manage Users Screen

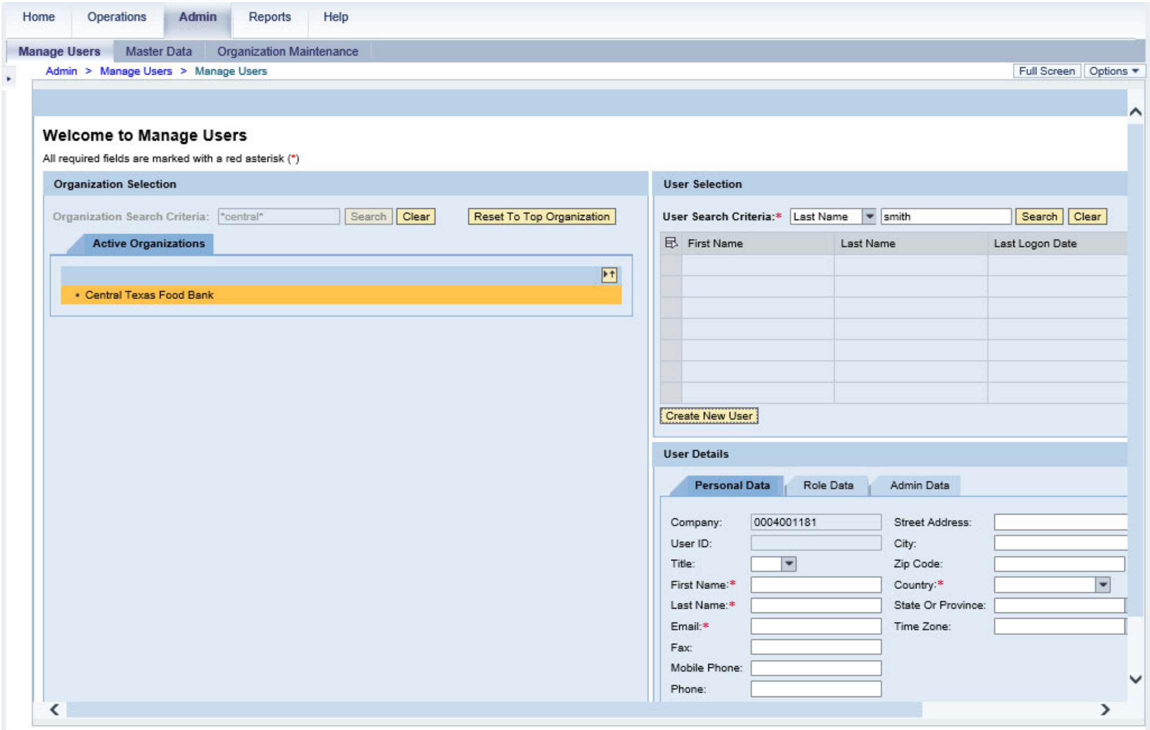


11. Click Create New User (the **Create New User** button) to create a new user ID.

(Note) In this example, as the message of the search is "*No search results found matching the entered criteria*." the new user can be created as it does not already exist in the system.

(Note) The *User Details* panel displays.

Image: Manage Users Screen



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

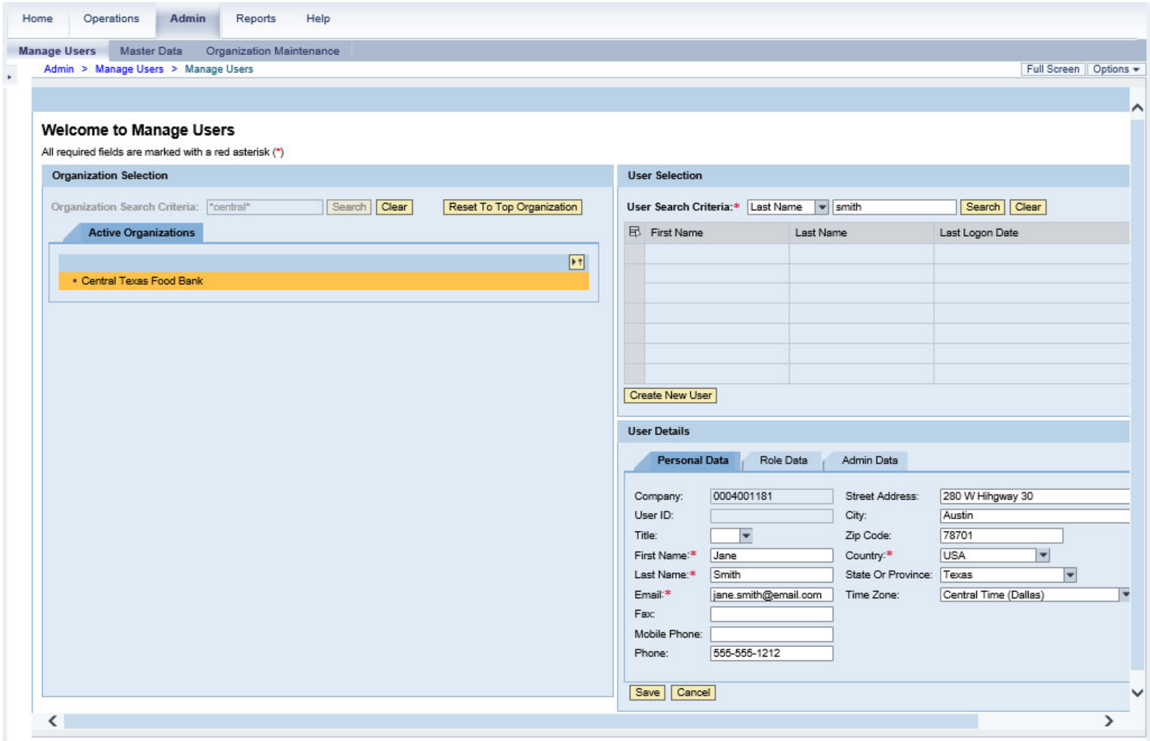
Field	R/O/C	Description
Company:	C	Numeric code assigned by the system for organization. **Example:** 0004001181 (Note) System generated business partner number
User ID:	C	Identification assigned to a user. (Note) The system will create the User ID after the record is saved.
Title:	O	A heading used before a surname or full name. (Note) Use (the **Drop-down** arrow) in the field to select the title.
First Name:	R	First name of the user. **Example:** Jane

Field	R/O/C	Description
Last Name:	R	Last name of the user. **Example:** Smith
Email:	C	Email address for the user or organization. **Example:** jane.smith@email.com (Note) This is the email address where the new registration email will be sent. The new user must have access to this email account.
Fax:	O	Fax number for the user or organization.
Mobile Phone:	O	Cellular phone number where the user or organization can be reached.
Phone:	O	Phone number for user or organization.
Street Address:	R	A free text field in which to enter the street address of the user or organization. **Example:** 280 W Highway 30
City:	R	City where the user or company is located. **Example:** Austin
Zip code:	R	Zip code for the location of the user or organization. **Example:** 78701 (Note) Zip code is required even though it is not marked with a red asterisk. If the user leaves this field blank or enters the zip code in incorrect format, an error

Field	R/O/C	Description
		will occur and the entry will need to be corrected before the user can be created.
Country:	R	Country code that represents country name. **Example:** USA (Note) Use (the **Drop-down** arrow) in the field to select the country.
State or Province:	R	State where the user or organization is located. **Example:** Texas (Note) Use (the **Drop-down** arrow) in the field to select the country.
Time Zone:	O	Standard time for a region throughout the world. **Example:** Central Time (Dallas) (Note) Use (the **Drop-down** arrow) in the field to select the country.

(Note) As a best practice, Admins should populate all known fields on the *Personal Data* tab.

Image: Manage Users Screen



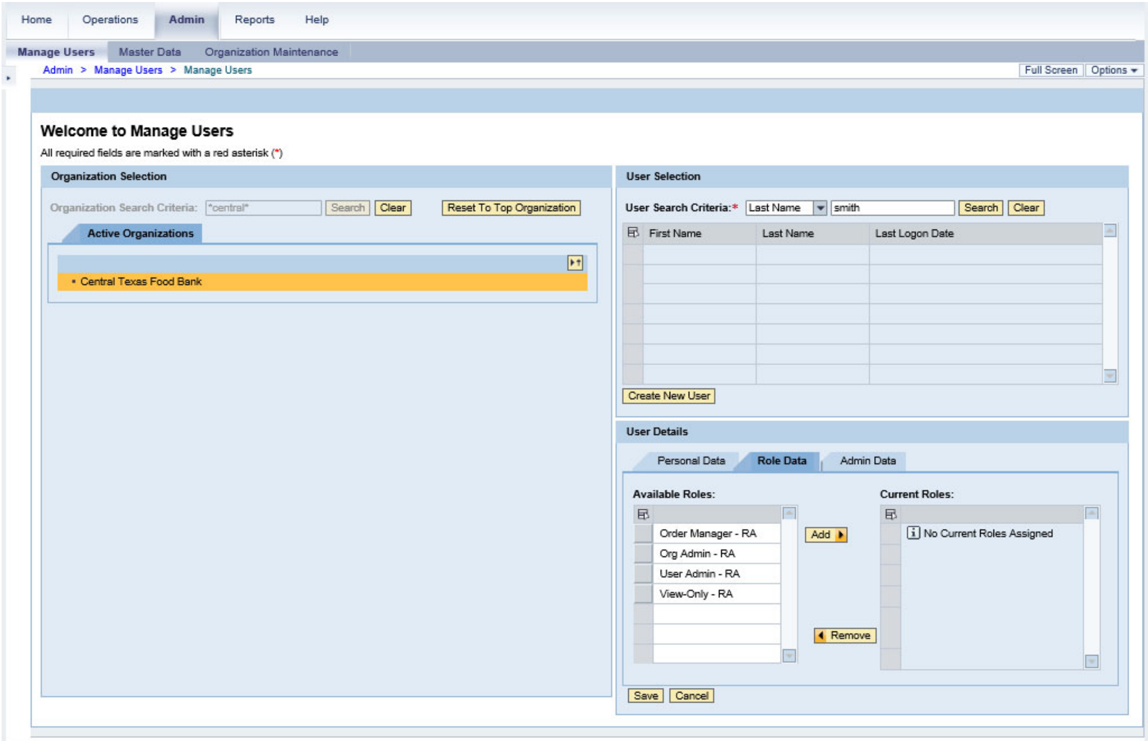
13. Click 

(the **Role Data** tab) to select roles for the new user.

(Note) The *Role Data* tab displays two columns that contain the following details:

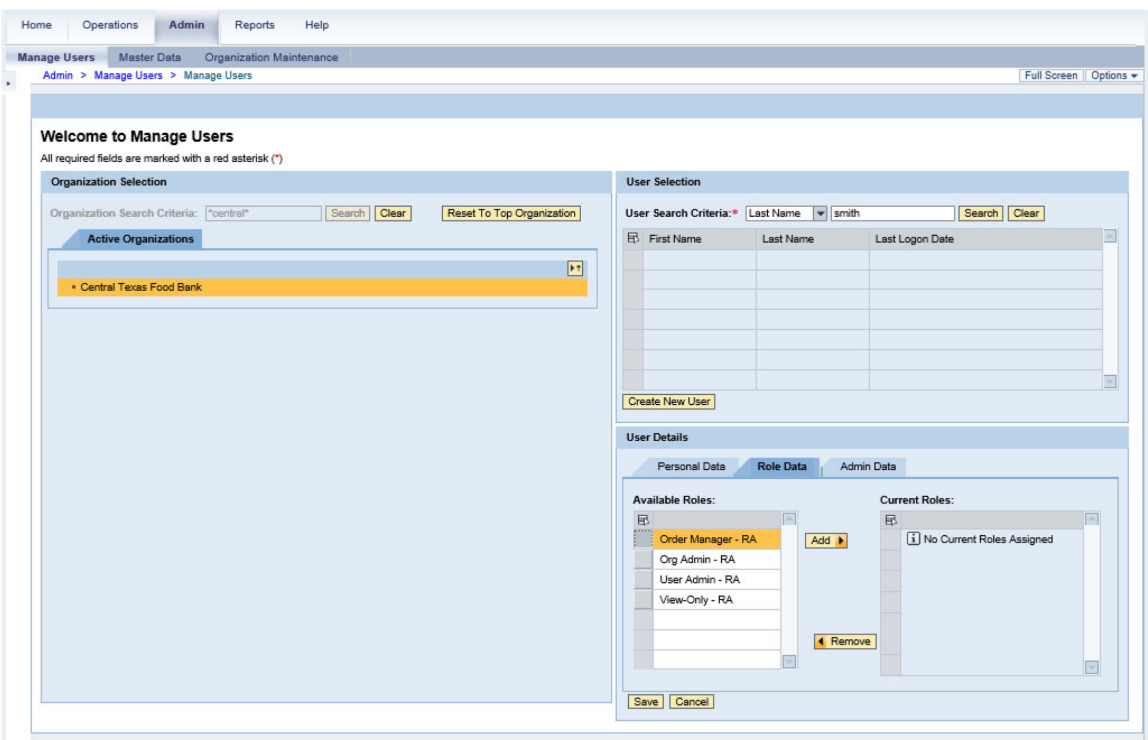
- **Available Roles** - All roles available, but not yet assigned, based on the new user's organization. Note that different roles are available for each type of organization; refer to the *WBSCM Role Assignment Matrix* job aid for more information.
- **Current Roles** - All roles currently assigned to the new user.

Image: Manage Users Screen



14. Click (the **Selection** button) next to a role to be assigned to the new user in the *Available Roles* column. In this example, the **Order Manager - RA** role is selected.

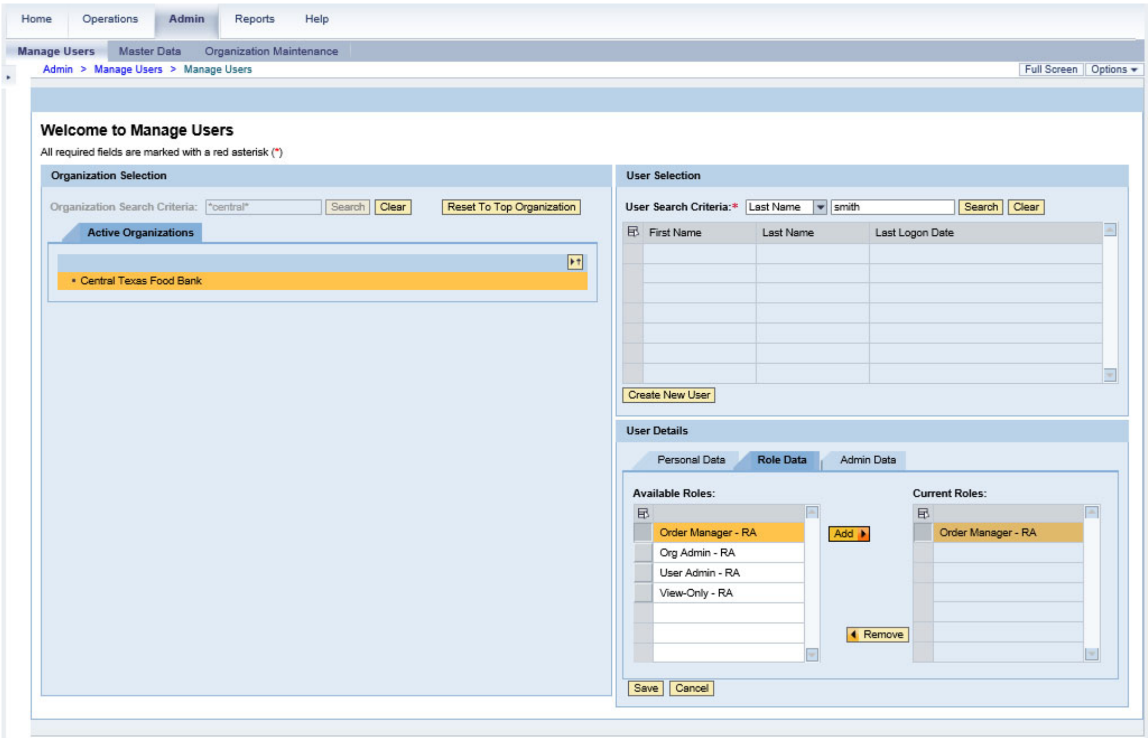
Image: Manage Users Screen



15. Click Add (the **Add** button) to assign the selected role, which will appear in the *Current Roles* column.

16. Repeat steps 14 and 15 to assign each additional role, as needed.

Image: Manage Users Screen

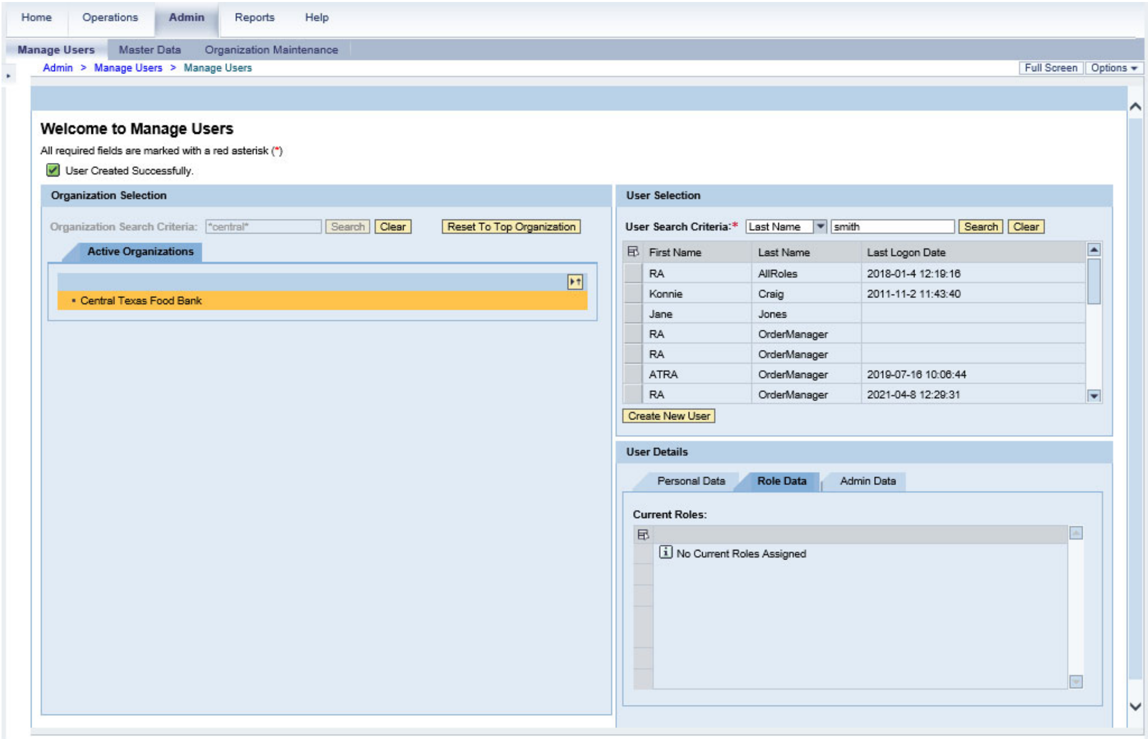


17. Click Save (the **Save** button) to save the new user.

(Note) The system displays a message "User Created Successfully".

(Note) Refer to the User Security Report job aid to review a list of created users and perform any required analysis.

Image: Manage Users Screen



18. The transaction is complete.

RESULT

A new user profile has been created in WBSCM. The new user will receive an email with instructions to set up an eAuth ID. After completing the steps described in the registration email, the new user will be able to access WBSCM. Provide the eAuthentication Tips and Support job aid to new users for support in creating the eAuth account.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for Organization (Org) and User Administrators (Admins) to review or modify user details in WBSCM. Admins will be able to update the user's name, contact information, and security roles for users within their own organization or sub-organization as follows:

- Org Admins can manage a user in their sub-organizations.
- User Admins can manage users only in their own organization.

The Admin can also lock or unlock user access to WBSCM or resend a registration/confirmation email to a user as required.

Process Trigger

Use this procedure to display or modify a user in WBSCM.

Prerequisites

- User performing this transaction must have the Org or User Admin role.
- User profile to be reviewed/updated must already exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab ➔ **Manage Users** tab ➔ **Manage Users** link to go to the *Manage Users* screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** - a mandatory field necessary to complete the transaction.
  - **Optional (O)** - a non-mandatory field not required to complete the transaction.
  - **Conditional (C)** - a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigational training and tips on creating favorites, performing searches, etc.
- If the user is a Corporate Vendor Administrator (CVA) and needs to review or change user details for their own organization, refer to the *Display and Maintain User (Vendor)* work instruction.
- Refer to the *WBSCM User Administration* job aid for an overview of the User Administration process.

PROCEDURE

1. Start the transaction using the following Portal path: **Admin** tab ➔**Manage Users** tab ➔**Manage Users** link.

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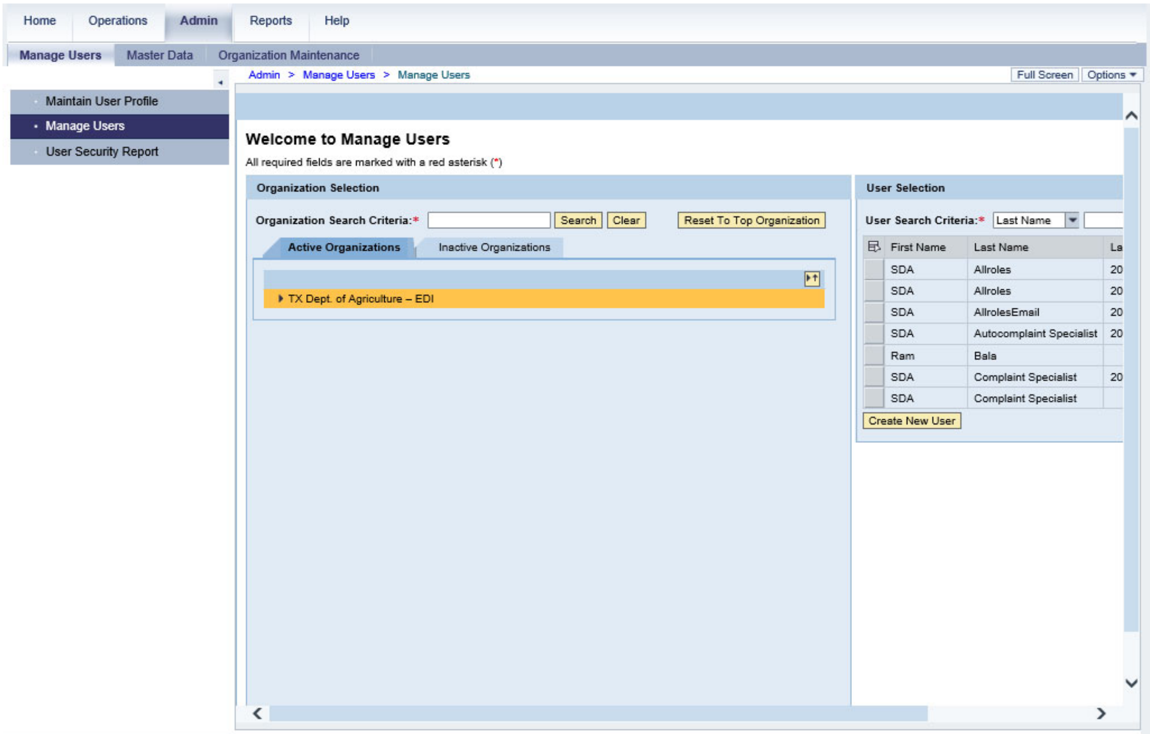


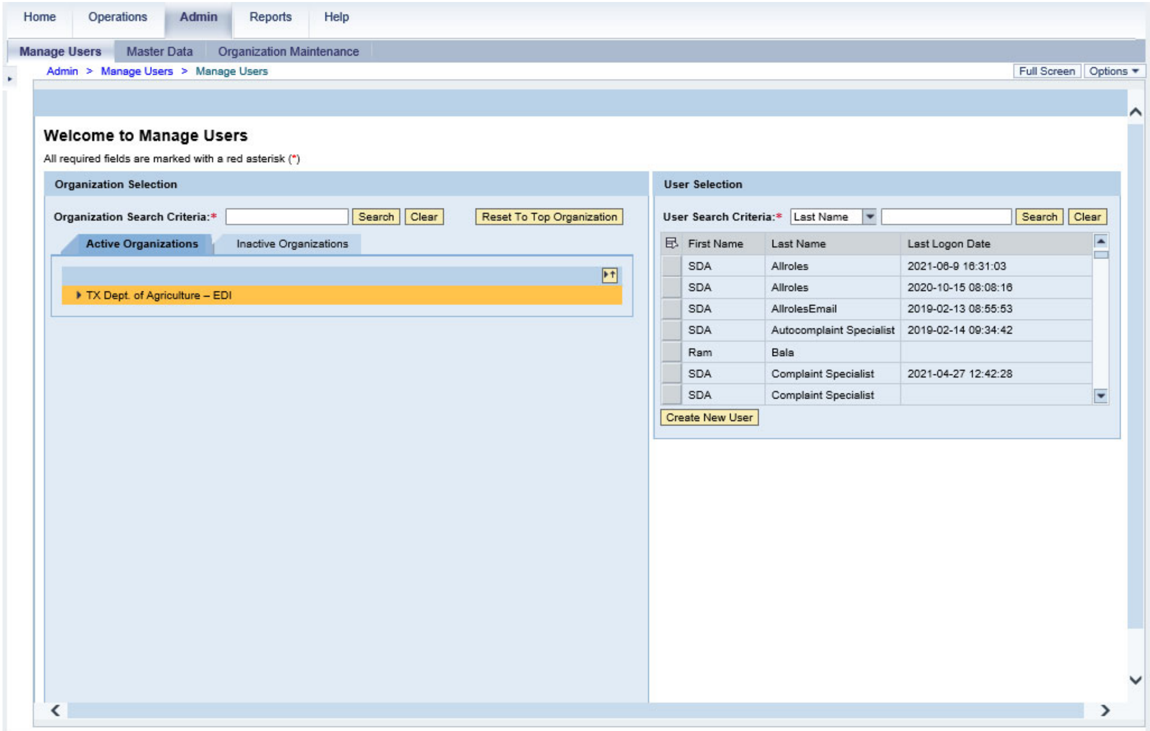
2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

(Note) The *Manage Users* screen content depends on the user's assigned role(s). For Org Admins, the organization and sub-organization(s) are listed in the *Organizations Selection* panel on the left. For both Org Admins and User Admins, the user details are listed in the *User Selection* panel on the right.

3. Perform one of the following:

If	Then
Admin needs to review or modify user details for a sub-organization	Go to Step 4.
Admin needs to review or modify user details for own organization	Go to Step 9.

Image: Manage Users Screen



4. Click (the **Available Organizations** arrow) next to the tree item at the top of the *Organization Selection* panel.

5. Click the **Organization Search Criteria** field.

(Note) The sub-organizations listed in the *Organizations Selection* panel for each type of organization include:

- **FSA** - Vendors or other sub-organizations (USAID, FAS, CPPAD, Private Voluntary Organizations (PVOs), Stevedores, and Freight Forwarders)
- **AMS** - Vendors
- **FNS** - Ship-tos, HQ Receiver, National WH (Warehouse), SDAs/ITOs, and Third Party Barter (SEAM)
- **SDA** - Co-Ops and Recipient Agency
- **Co-Op** - Recipient Agency
- **Recipient Agency** - No sub-organizations
- **HQ Receivers** - Dom Ship-tos
- **Dom Ship-to** - No sub-organizations
- **National WH** - No sub-organizations

(Note) Only Org Admins for USDA agencies, and SDAs/ITOs can update users for their sub-organizations. Co-Ops can view but cannot make updates to users form their sub-organizations (RAs). Other Admins can update users for their own organization only.

(Note) In the *Organizations Selection* panel, for each organization, the **Active Organizations** and **Inactive Organizations** tabs display is dependent on the sub-organization status. For example, if an organization only has active sub-organizations, then only the **Active Organizations** tab will display and the **Inactive Organizations** tab will be hidden. In this example, the organization has both active and inactive sub-organizations; therefore, both the **Active Organizations** and **Inactive Organizations** tabs are displayed.

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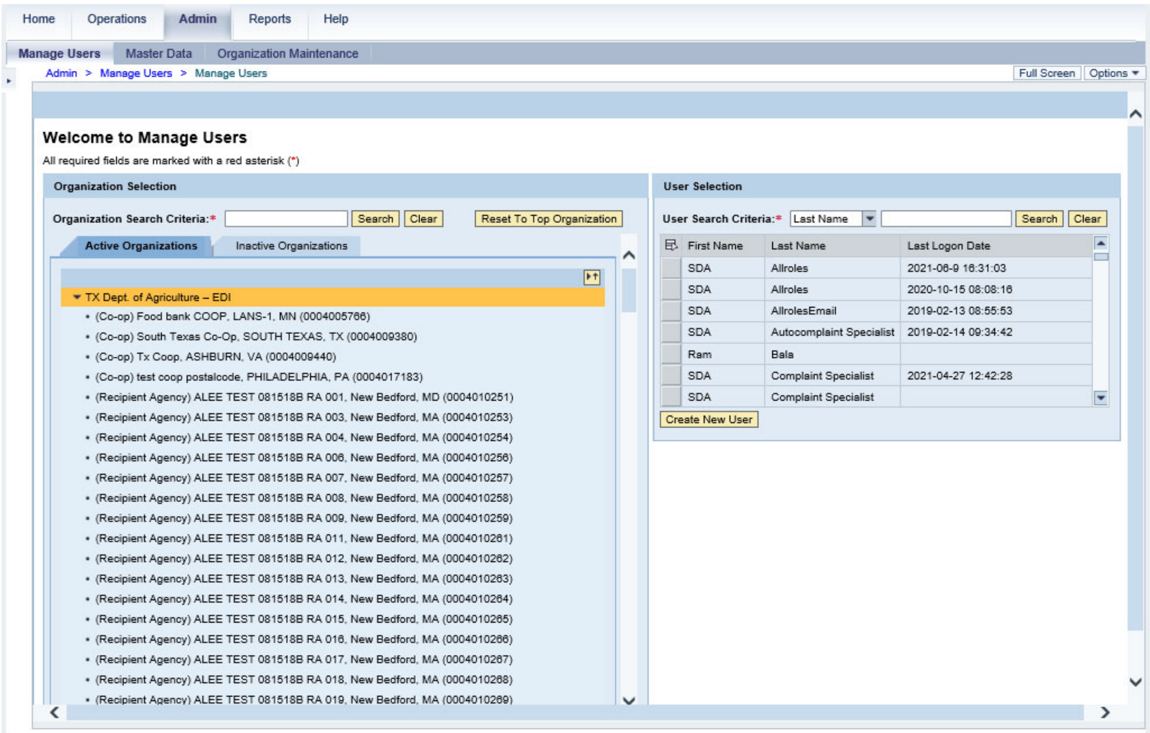

6. As required, complete/review the following fields:

Field	R/O/C	Description
Organization Search Criteria	R	Field on a WBSCM screen used to define the criteria for a search. **Example:** *central* (Note) Use the wildcard symbol to search part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

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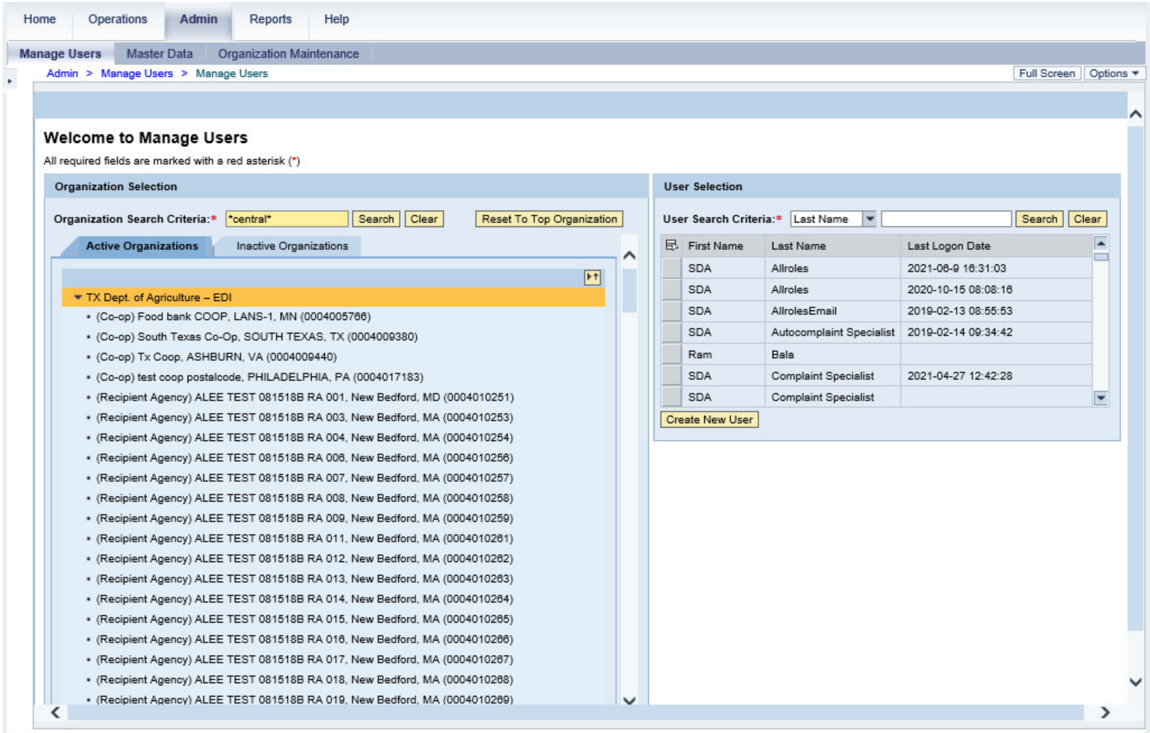
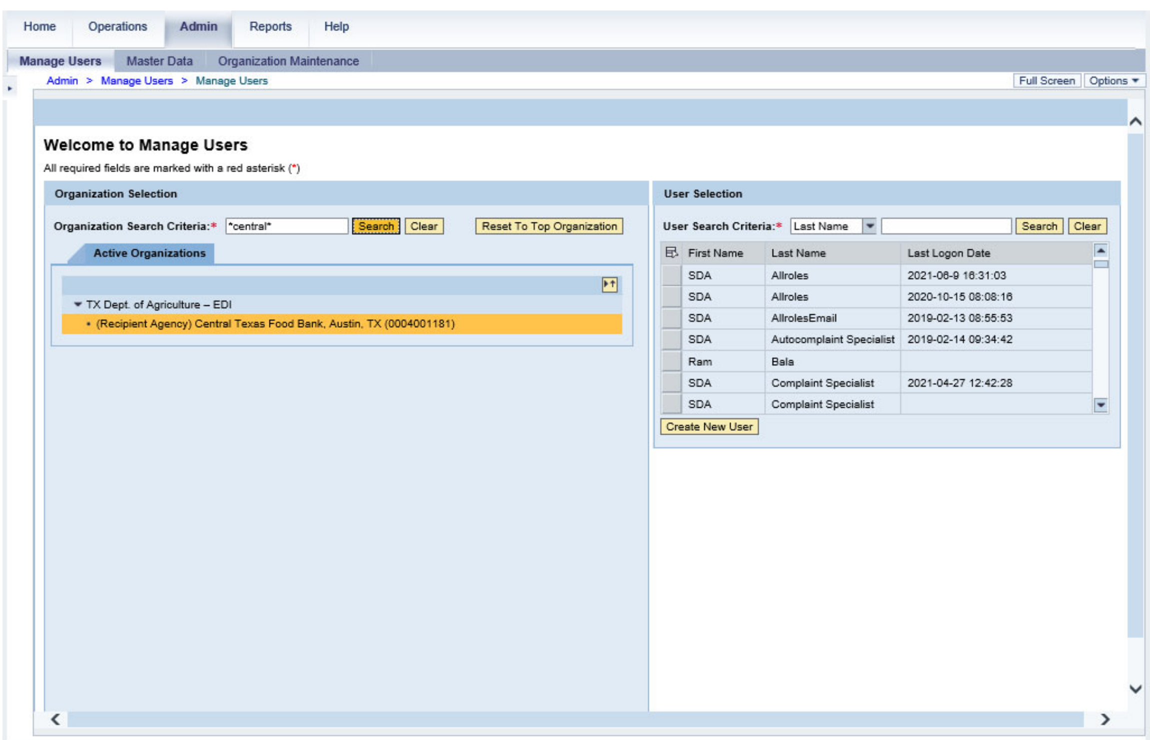


7. Click Search (the **Search** button) to search for the matching sub-organization(s).

Image: Manage Users Screen



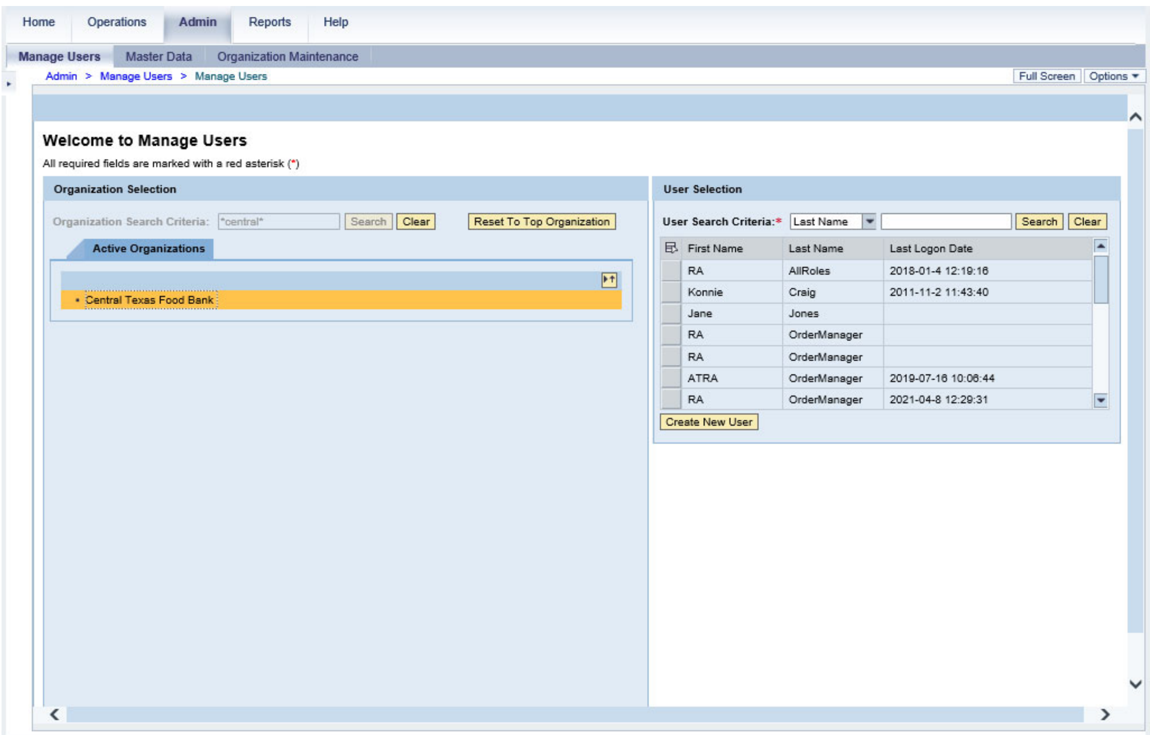
8. Select the appropriate sub-organization in the *Organization Selection* panel.

(Note) The users for the selected sub-organization will display in the *Users Search* panel.

(Note) Confirm that the correct organization is selected in the *Organization Selection* panel on the left. To return to the top-most organization, click Reset To Top Organization (the **Reset to Top Organization** button).

(Note) In this example, the **Central Texas Food Bank** has an active organization; therefore, only the **Active Organizations** tab displays.

Image: Manage Users Screen

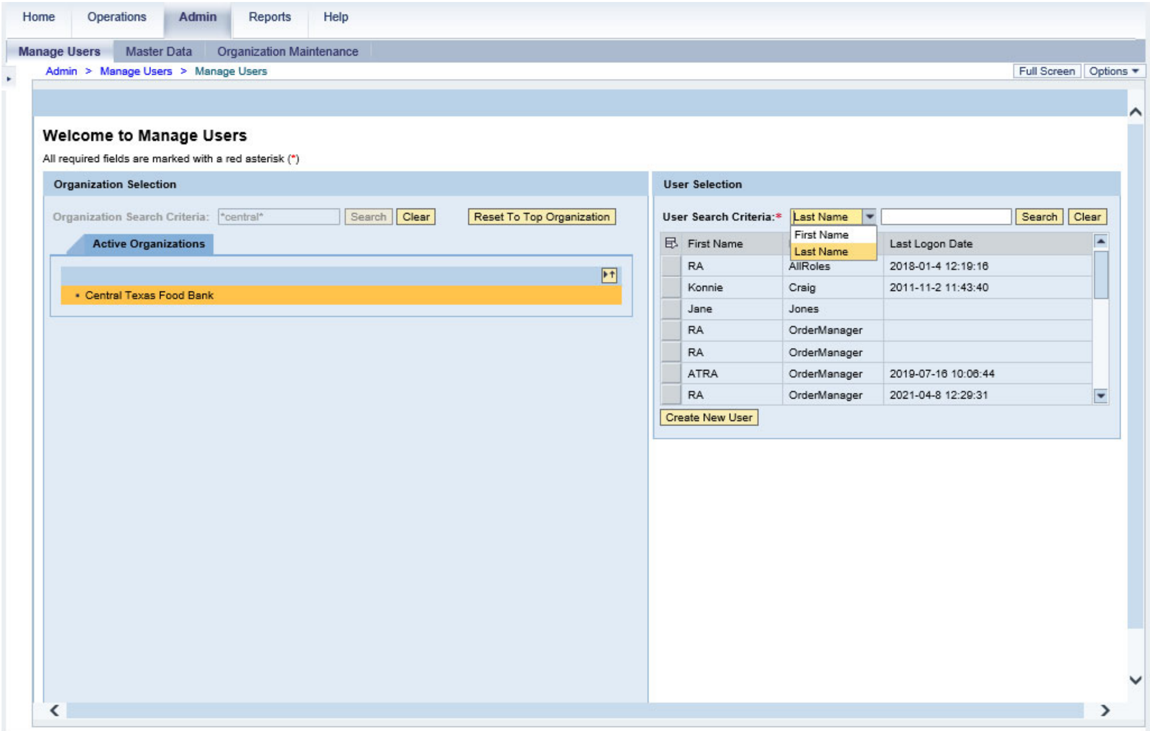


9. If necessary, click (the **Drop-down** arrow) in the **User Search Criteria:** field to select the first name.

(Note) If there are many users selected , it may be helpful to perform a search to find the user profile(s) that needs to be reviewed or updated.

(Note) **Last Name** is the default option for the **User Search Criteria** field. The user can select the **First Name** as a search option by clicking on (the **drop-down** arrow) and select **First Name** from the option list. In this example, **Last Name** is used.

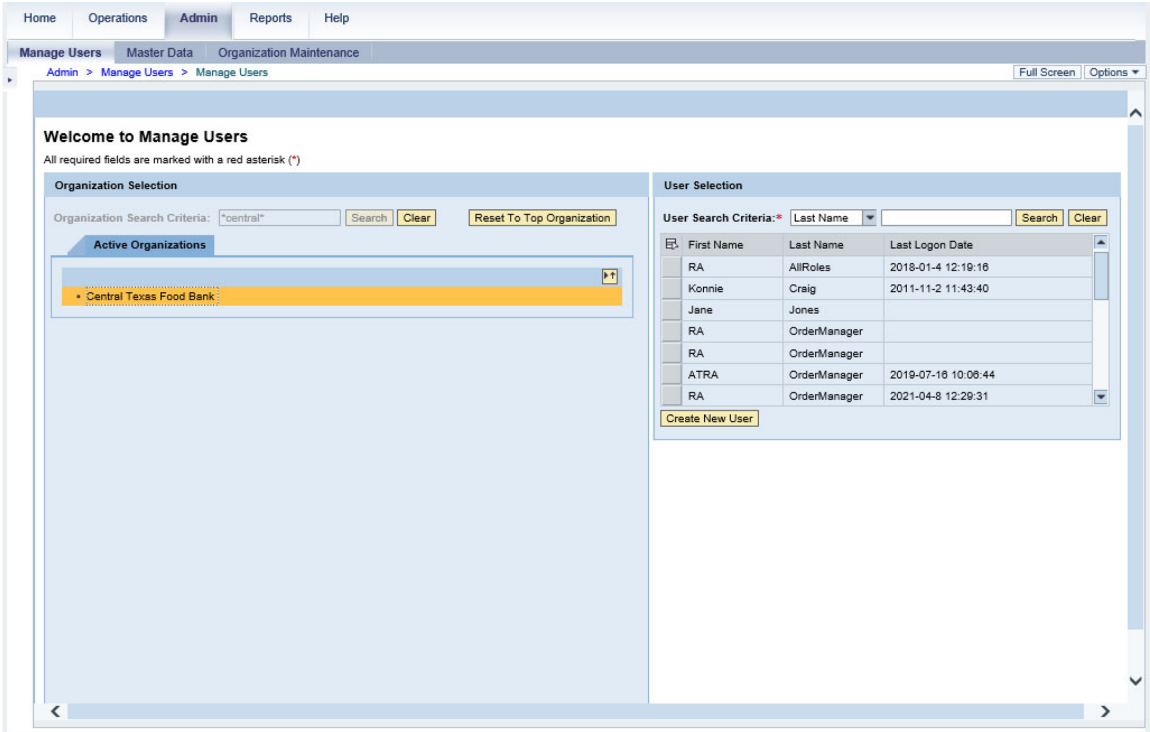
Image: Manage Users Screen



10. Perform one of the following:

If	Then
Admin needs to search for an existing user by last name	Enter the Last name in the **User Search Criteria** field. Last Name (the **Last Name** option) is the default option.
Admin needs to search for an existing user by first name	Click First Name (the **First Name** option) from the **User Search Criteria** drop-down.

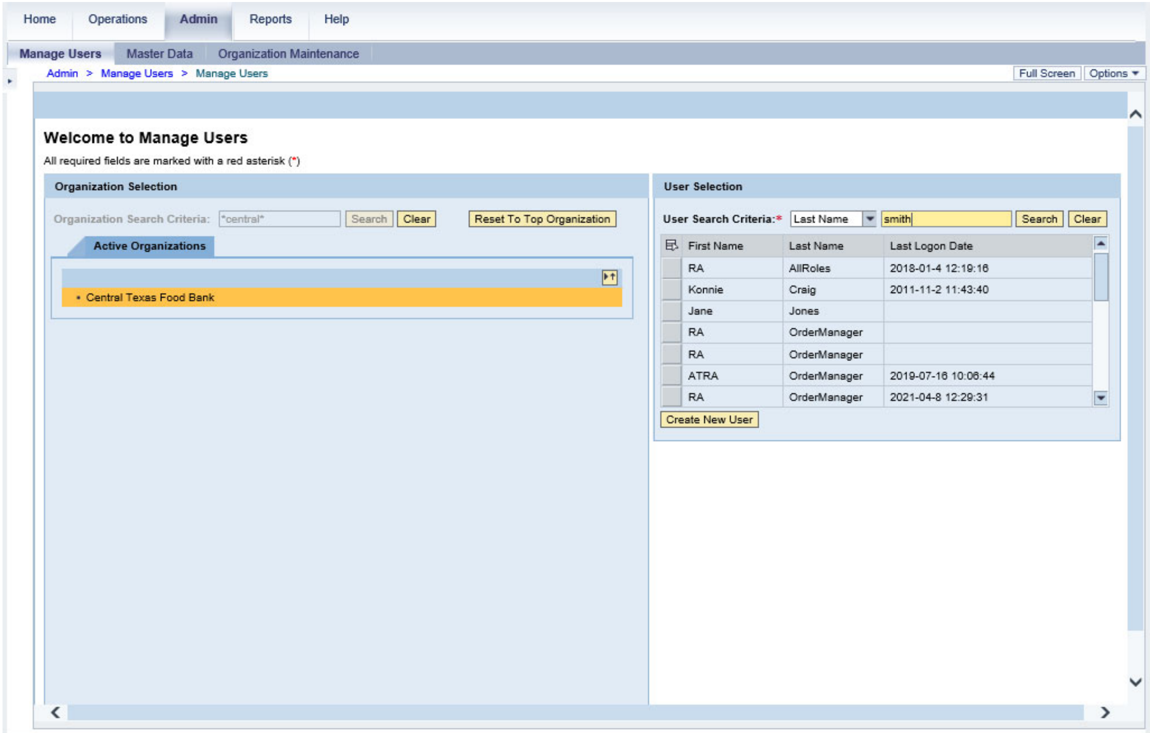
Image: Manage Users Screen



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

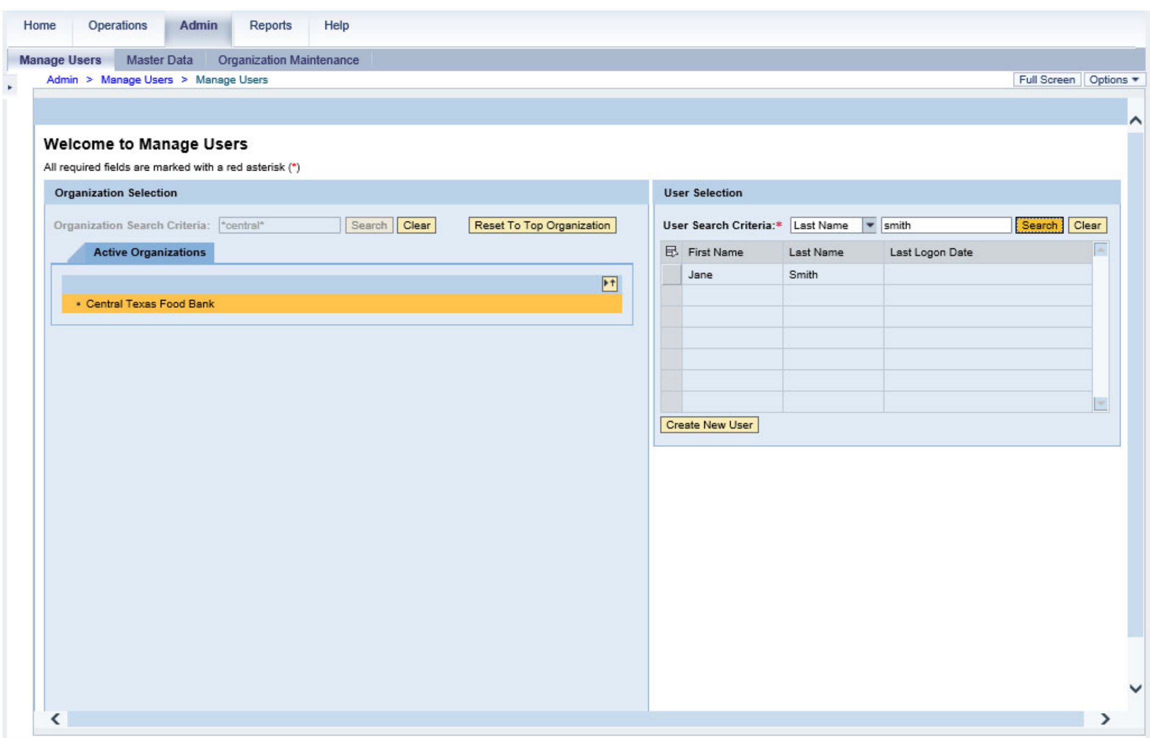
Field	R/O/C	Description
User Search Criteria: (value)	R	First name or last name of the user to locate. **Example:** smith (Note) Use the wildcard symbol to search part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

Image: Manage Users Screen



12. Click Search (the **Search** button) to generate a list of matching user profiles in WBSCM.

Manage Users Screen

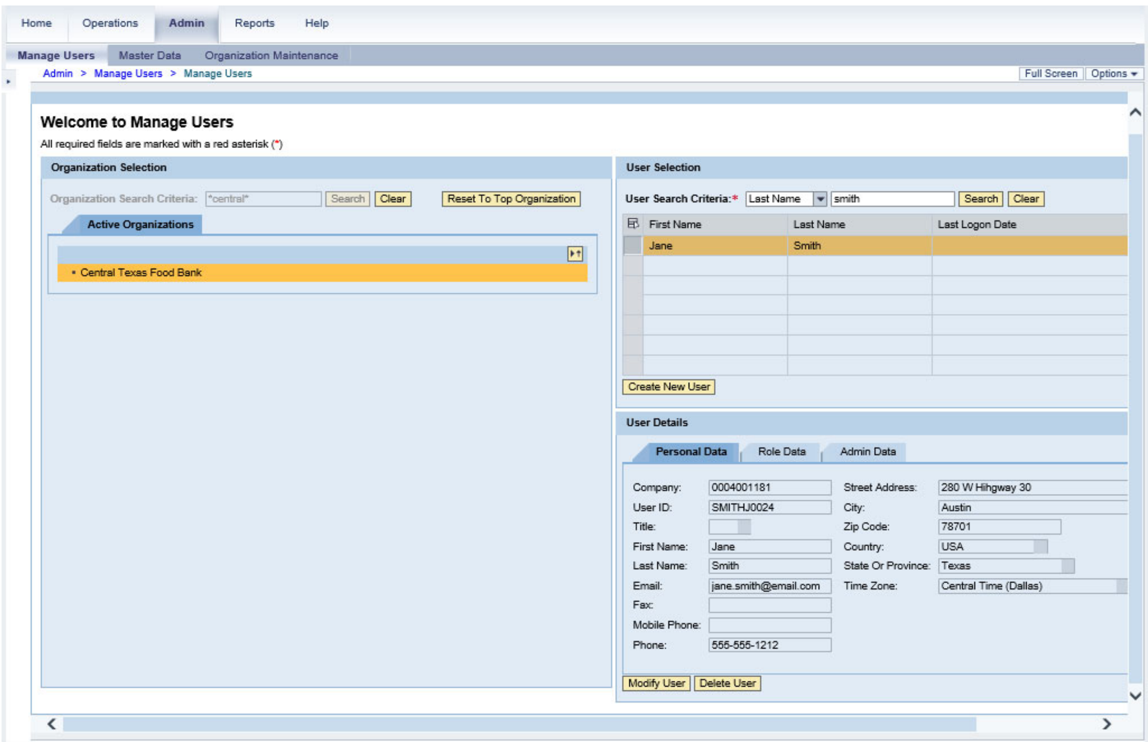


13. Click (the **Selection** button) next to the user to be modified. In this example, **Jane Smith** is selected.

(Note) The *User Details* panel displays information for the selected user on the following three tabs:

- *Personal Data* - User name, organization, and contact information
- *Role Data* - User security role details
- *Admin Data* - User account status and available actions

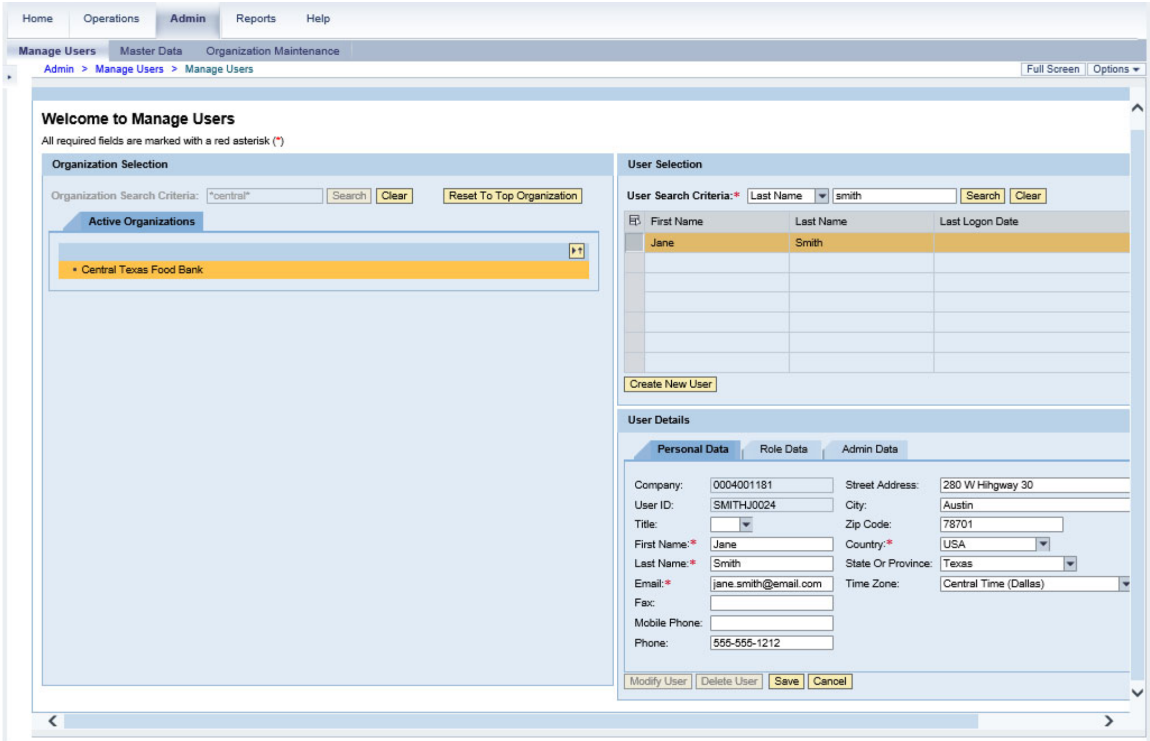
Image: Manage Users Screen



14. Perform one of the following:

If	Then
Admin needs to review the user profile details without making changes	Go to Step 15.
Admin needs to make changes to the user's name, contact information, and/or security roles	1. Click Modify User (the **Modify User** button) to activate modify mode. 2. Go to Step 15.
Admin needs to perform other administrative actions on the selected user profile	Go to Step 20.

Image: Manage Users Screen



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

Field	R/O/C	Description
Title:	O	A heading used before a surname or full name. (Note) Use (the **Drop-down** arrow) in the field to select the title.
First Name:	O	First name of the user. **Example:** Jane
Last Name:	O	Last name of the user. **Example:** Smith
Email:	O	Email address for user or organization. **Example:** janesmith@email.com (Note) This is the email address where the new registration email will be sent. The new user must have access to this email account.

Field	R/O/C	Description
Fax:	O	Fax number for the user or business partner.
Mobile Phone:	O	Cellular phone number where the user or organization can be reached.
Phone:	O	Phone number for a user or organization. **Example:** 555-555-1212
Street Address:	O	A free text field to enter the main street address of the user or organization. **Example:** 280 W Highway 30
City:	O	City where the user or company is located. **Example:** Austin
Zip Code:	O	Zip code for the location of the user or organization. **Example:** 78701 (Note) Zip code is required even though it is not marked with a red asterisk. If the user leaves this field blank or enters the zip code in incorrect format, an error will occur and entry will need to be corrected before user can be created.
Country:	O	Country code that represents country name. **Example:** USA (Note) Use (the **Drop-down** arrow) in the field to select the country.

Field	R/O/C	Description
State Or Province:	O	State where the user or organization is located. **Example:** Texas (Note) Use (the **Drop-down** arrow) in the field to select the state or province.
Time Zone:	O	Standard time for a region throughout the world. **Example:** Central Time (Dallas) (Note) Use (the **Drop-down** arrow) in the field to select the time zone.

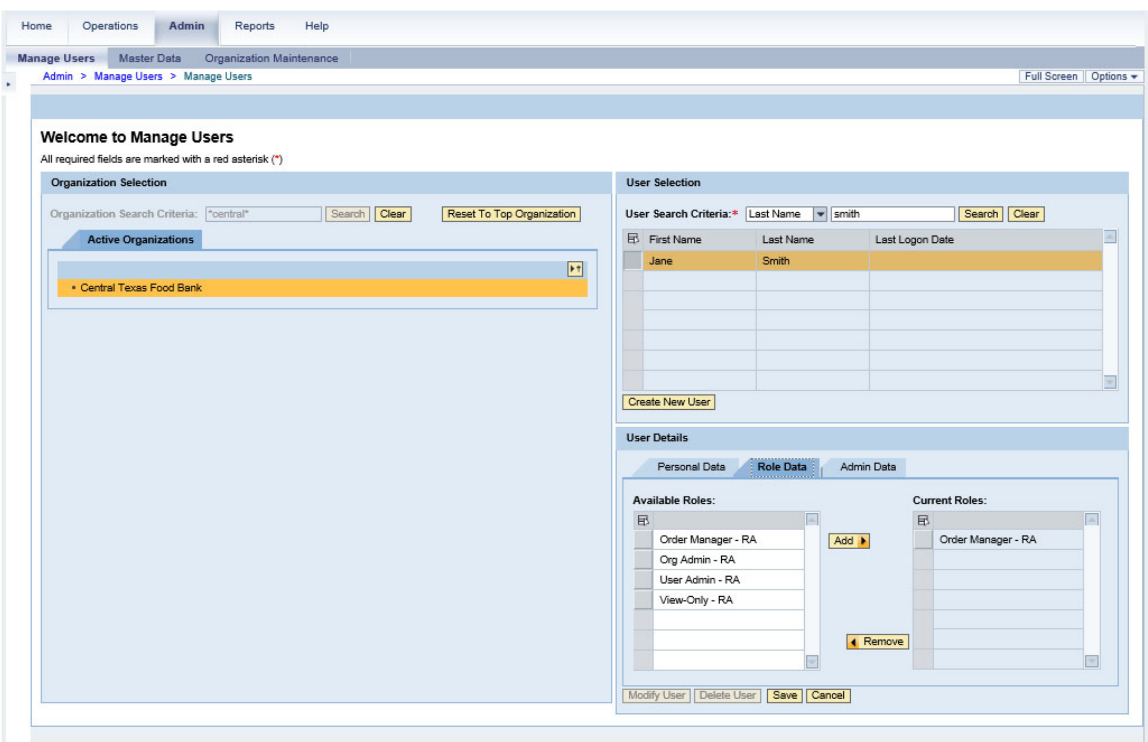
(Note) Fields that are grayed out may not be edited.

16. Click Role Data (the **Role Data** tab) to review or update user role details.

(Note) The *Role Data* tab displays two columns that contain the following details:

- **Available Roles** - All roles available but not yet assigned based on the user's organization. Note that different roles are available for each type of organization; refer to the *WBSCM Role Assignment Matrix* job aid for more information.
- **Current Roles** - All roles currently assigned to the new user.

Image: Manage Users Screen



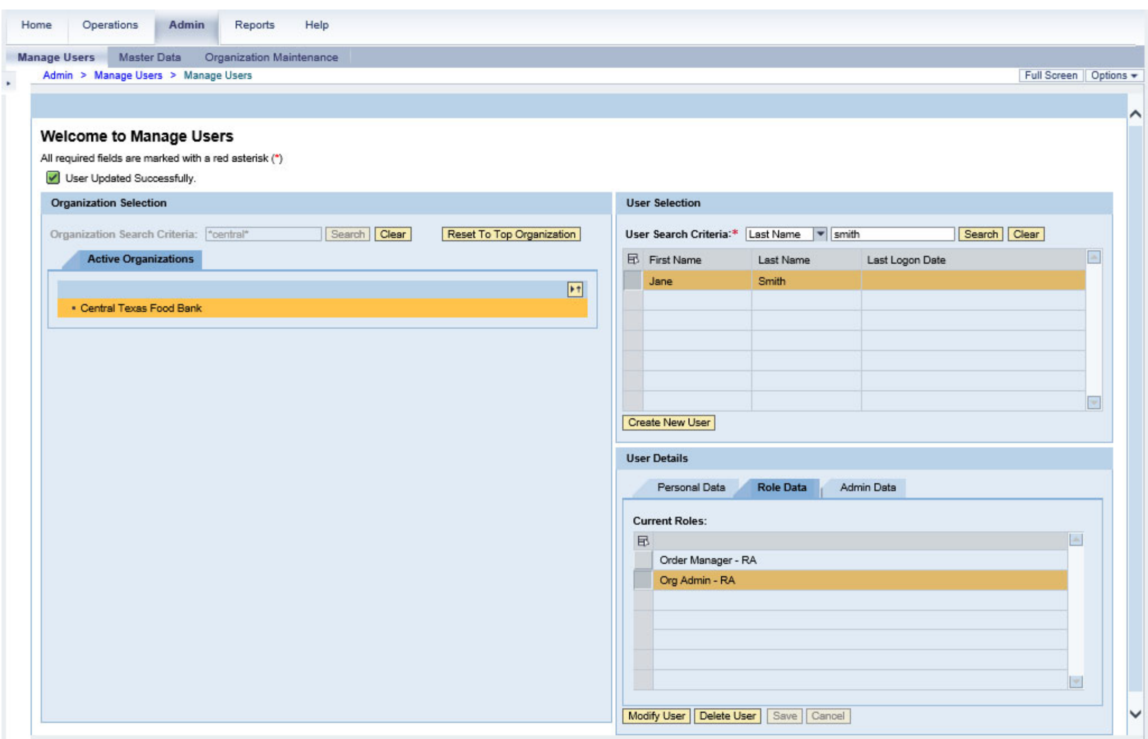
17. Perform the following as needed:

If	Then
Admin needs to assign a role to the selected user	1. Click (the **Selection** button) next to the role in the *Available Roles* column. 2. Click Add (the **Add** button) to assign the role to the user. (Note) Once assigned, the role will appear in the *Current Roles* column.
Admin needs to unassign a role from the selected user	1. Click (the **Selection** button) next to the role in the *Current Roles* column. 2. Click Remove (the **Remove** button) to unassign the role from the user. Once unassigned, the role will appear in the *Available Roles* column.
Admin has completed updates to *Role Data*	Go to Step 20.

(Note) If not already in modify mode, click Modify User (the **Modify User** button).

(Note) Each role must be assigned/unassigned individually. In this example, the **Org Admin - RA** role is added. Repeat the steps above as needed.

Image: Manage Users Screen



18. Click Save (the **Save** button) to save any changes to the *Personal Data* and *Roles Data* tabs.

(Note) This button will only appear if modify mode was activated.

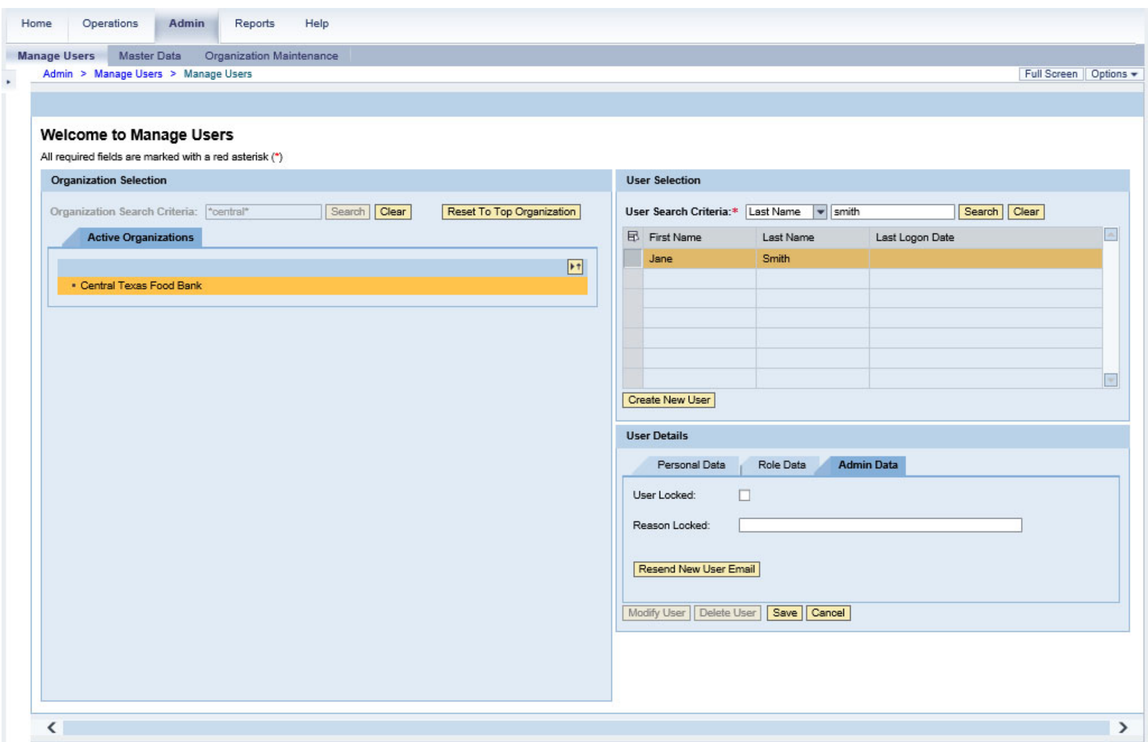
(Note) WBSCM displays a message that the user was updated successfully.

19. Perform one of the following:

If	Then
Admin needs to review account status or perform administrative actions on the selected user profile	Go to Step 20.
Admin needs to delete the selected user profile	Go to Step 22.
Admin has completed all updates	Go to Step 24.

20. Click Admin Data (the **Admin Data** tab) to lock/unlock the user profile or resend eAuth instructions to the new user.

Image: Manage Users Screen

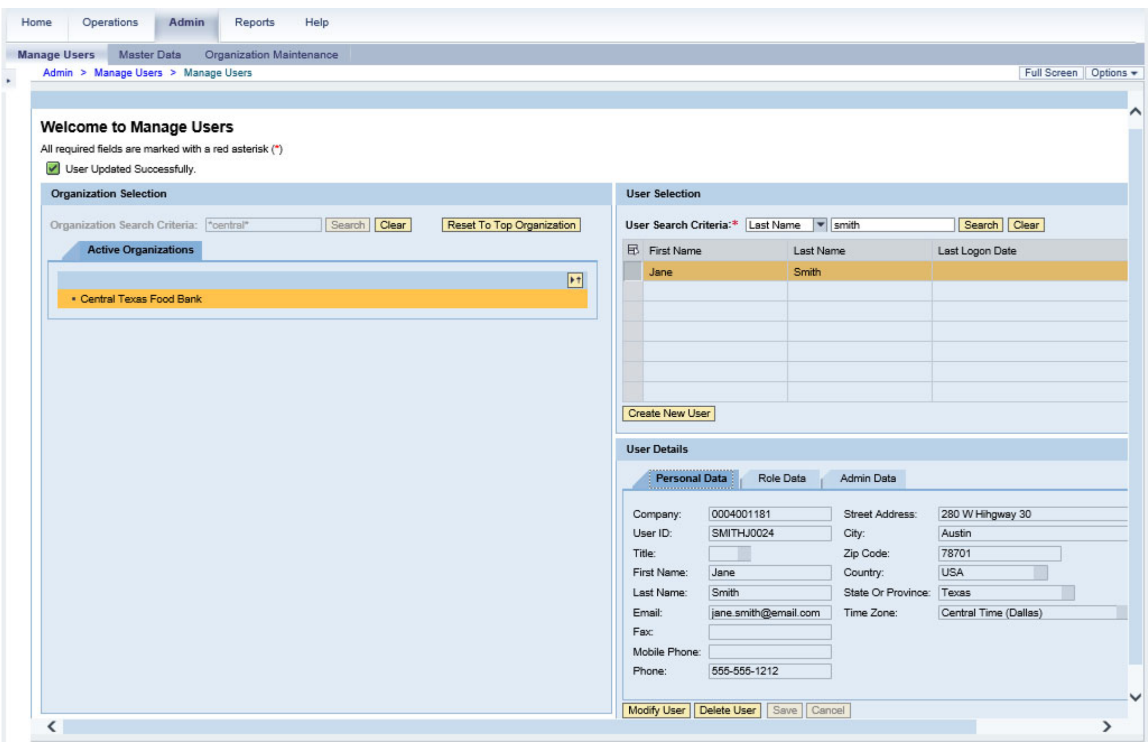


21. Perform any of the following:

If	Then
Admin needs to lock the user	1. Click Modify User (the **Modify User** button) to activate modify mode. 2. Click ☐ (the empty checkbox) next to **User Locked** to lock the user profile, preventing the user from accessing WBSCM. 3. As applicable, provide information in the

If	Then
	Reason Locked: field. 4. Click Save (the **Save** button) to save the changes.
Admin needs to unlock the user	1. Click Modify User (the **Modify User** button) to activate modify mode. 2. Click ☑ (the checked box) next to **User Locked:** to unlock the user profile, allowing the user to access WBSCM. 3. As applicable, provide information in the **Reason Locked:** field. 4. Click Save (the **Save** button) to save the changes.
Admin needs to send the eAuth registration email to the user again	Click Resend New User Email (the **Resend New User Email** button) to have the system resend the new user registration email.
Admin has no further updates	Go to Step 24.

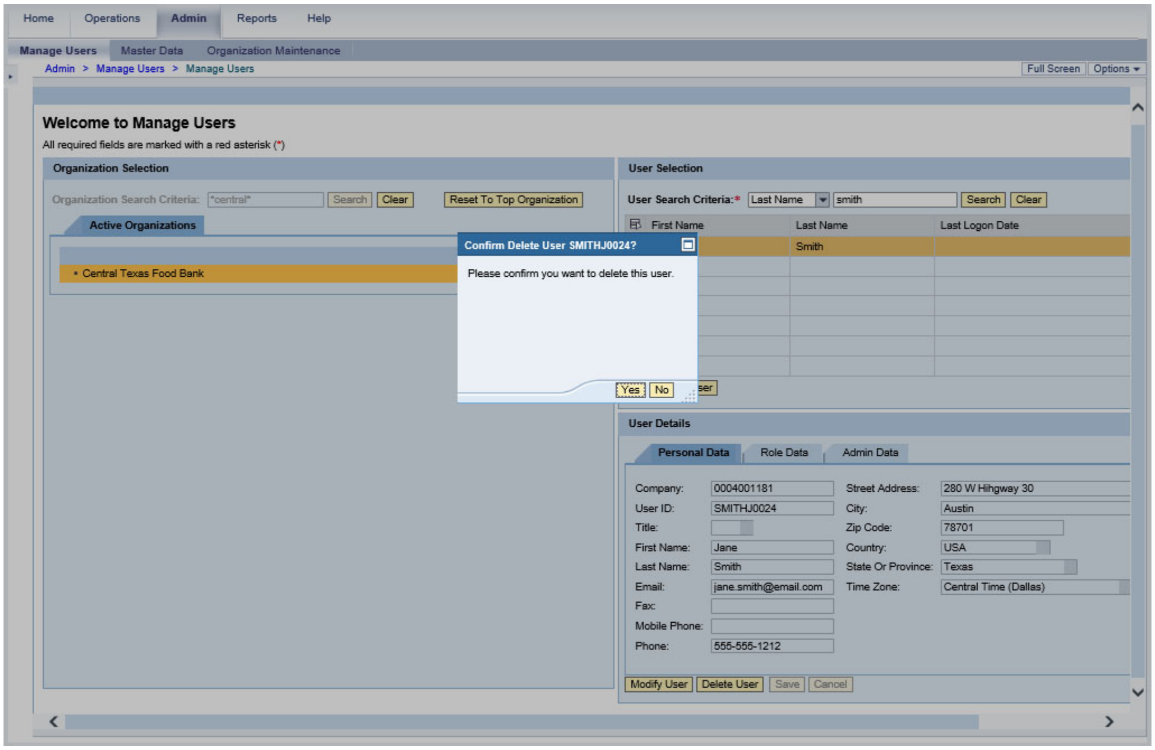
Image: Manage Users Screen



22. Click Delete User (the **Delete User** button) to remove the user.

(Note) Delete User (the **Delete User** button) is active only in display mode. If the user is in modify mode the button is grayed out and cannot be used.

Image: Confirm Delete User SMITHJ0024? Pop-Up



23. Click Yes (the **Yes** button) to confirm in the *Confirm Delete User* pop-up window.

(Note) After a user profile is deleted, the Admin will no longer be able to search for or display the user in the *Manage User* screen; however, the User Security Report shows deleted users.

(Note) Refer to the User Security Report job aid to review a list of users and perform any required analysis.

24. The transaction is complete.

RESULT

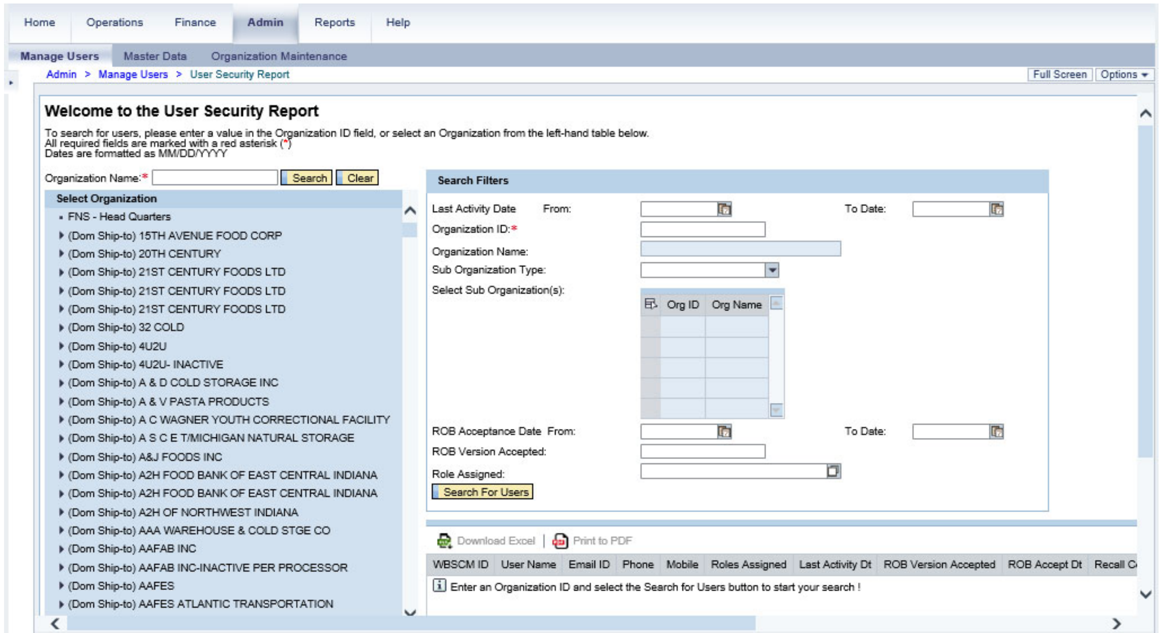
User details have been reviewed or modified. This could include:

- Reviewed/updated personal data
- Reviewed/assigned/unassigned security roles
- Locked/unlocked user
- Resent eAuth email
- Deleted the user

<table>
<tr><td>Title</td><td>User Security Report</td></tr>
<tr><td>Purpose</td><td>This report provides details on all users (including locked and deleted) within the selected Organization and/or Sub Organization types. The report selection criteria can be completed using one of two methods described in this job aid.</td></tr>
<tr><td>Portal Navigation Path</td><td>Admin tab ➔ Manage Users tab ➔ User Security Report</td></tr>
<tr><td>Target Audience</td><td>Organization Administrators (Org Admins) and User Administrators (User Admins)

This report is used for various purposes, including:
<table>
<tr><th>USDA Users</th><th>Customer and Vendor Administrators</th></tr>
<tr><td>Monitor for non-active users per agency’s policy
Confirm and validate role assignments to USDA users as per USDA policy
Validate that users have maintained correct email and contact information
Validate the existence of active Recall Contact users at each state agency and tribal organization (SDA/ITO)</td><td>Monitor for non-active users per organization’s policy
Confirm and validate role assignments and Status for organization (and sub organization) users
Validate that users have maintained correct email and contact information, and use this information to update internal systems and organizational resources
Validate the existence of active Recall Contact users at their organization</td></tr>
</table>
Note: To include users from sub-organizations, a User Admin must also have the Org Admin role.</td></tr>
</table>

Report Selection Screen – By Organization Name (Org Admins only)

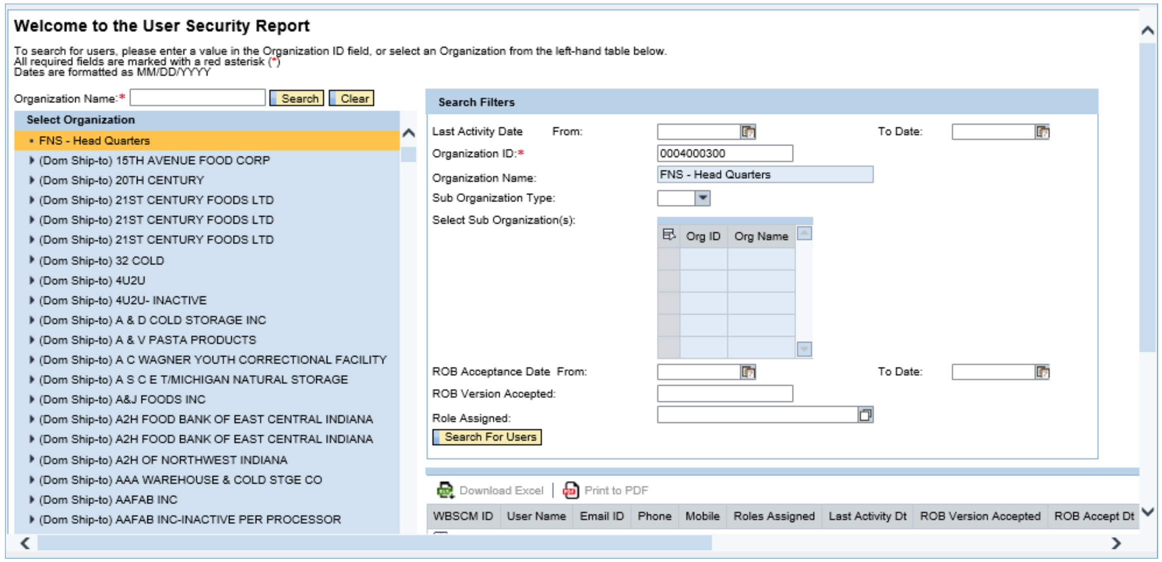


To select an organization by name:

1. Use the **Organization Search Term** functionality to find the matching organization(s) from the pane on the left.
    a. Enter part of an organization's name in the **Organization Name** field.
    b. Click Search (the **Search** button).
2. Select an organization from the displayed list in the *Select Organization* pane, using (the **Vertical scrollbar** arrow) to scroll down to the organization, if needed.
3. The **Organization ID** and **Organization Name** display in the *Search Filters* pane.
4. Enter additional search filters as appropriate to limit search results.
5. Click Search For Users (the **Search for Users** button) to perform the search.

Report Selection

Screen – By Sub-Organization Type (Org Admins only)

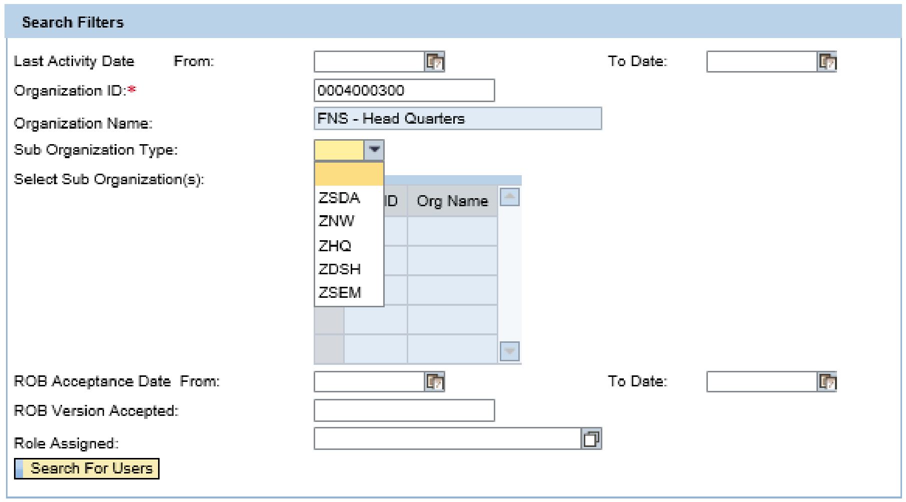


To select a sub-organization by type:

1. Select the **Organization Name** from the left side pane (see above) or manually enter the **Organization ID**. The organization selected must be a node, indicated by ▪ (the **Node** indicator). Note: If the user incorrectly enters the **Organization ID**, an error will display.
2. The **Organization ID** and **Organization Name** appear in the *Search Filters* pane.

Report Selection

Screen – By Sub-Organization Type (Org Admins only)

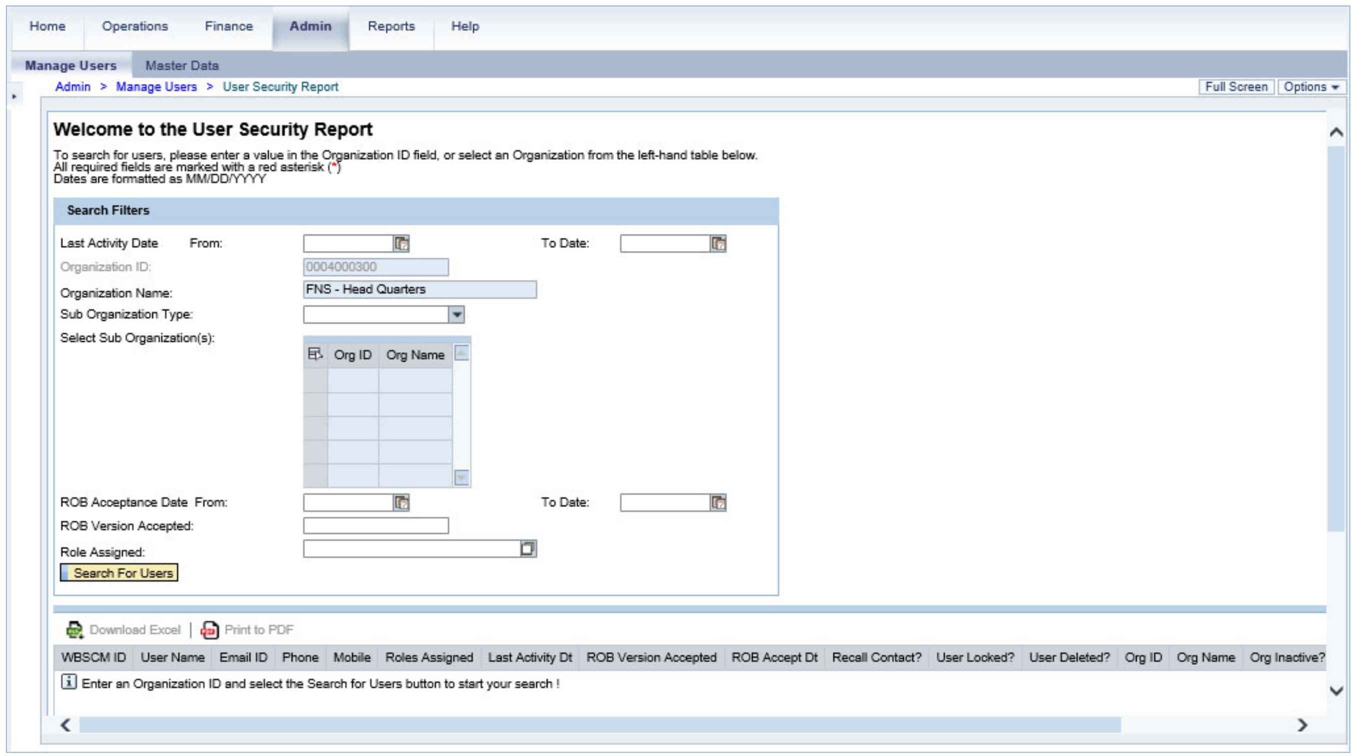


3. Click  (the **Sub Organization Type** drop-down button) to view and select from available options.
   - Hold down the **Ctrl** key and click to select multiple individual organizations from the list.
   - Hold down the **Shift** key and click to select a range of adjacent organizations from the list.
   - Click  (the **Table Selection Menu** button) to **Select All** or **Deselect All** organizations.

4. Enter additional search filters as appropriate to limit search results.

5. Click  (the **Search for Users** button) to perform a search.

Report Selection Screen (User Admins)



1. Update the search criteria as appropriate.
2. Click Search For Users (the **Search for Users** button) to perform a search.

Report Output

Note: The *User Security Report* uses the Business Partner Hierarchy implemented in WBSCM.

Note: The *User Security Report* displays a user's General Communication contact methods, including email, phone number, and/or mobile number. Recall Contact communication methods (for users with that role) are not included in this report.

When running this report, Org Admins can search within their own organization as well as its sub organizations. User Admins can search for users only within their own organization.

The images below are an example of the results of the User Security Report for either an Org Admin or a User Admin.

List of users retrieved: 421

Download Excel | Print to PDF

WBSCM ID	User Name	Email ID	Phone	Mobile	Roles Assigned	Last Activity Dt	ROB Version Accepted
MILLSM0001	Mary Mills	mary.mills@fns.usda.gov	703-305-2678		Order Manager - FNS View Only - FNS	2012-12-28 06:48:55	1.0
LIVINGSM0001	Margie Livingston	margie.livingston@fns.usda.gov	703-305-2679	202-257-9811	Order Manager MSD - FNS View Only - FNS	2017-03-1 16:10:09	1.0
TOMASSIH0001	Holly Tomassini	holly.tomassini@fns.usda.gov	609-259-5074		Order Manager - FNS Recall Contact - Internal Recall Specialist - FNS View Only - FNS		

Scroll to the right for additional fields:

ROB Accept Dt	Recall Contact?	User Locked?	User Deleted?	Org ID	Org Name	Org Inactive?	Org Type	Org Address
2010-12-8 10:26:48	☐	☑	☑	0004000300	FNS - Head Quarters	☐	FNS	3101 PARK CENTER DRIVE 993, ALEXANDRIA, VA 22302-1500
2010-12-14 16:05:11	☐	☐	☐	0004000300	FNS - Head Quarters	☐	FNS	3101 PARK CENTER DRIVE 993, ALEXANDRIA, VA 22302-1500
	☑	☑	☑	0004000300	FNS - Head Quarters	☐	FNS	3101 PARK CENTER DRIVE 993, ALEXANDRIA, VA 22302-1500

Report Output

The report displays a list of users that match the selection criteria.

Fields	Definitions
WBSCM ID	Unique WBSCM ID for each user.
User Name	First and Last name of the user listed in WBSCM.
Email ID	Email address(es) of the user.
Phone	Phone number(s) for user or organization.
Mobile	Cellular phone number(s) where the user or organization can be reached.
Roles Assigned	All roles currently assigned to the user.
Last Activity Dt	The last date the user logged into WBSCM.
ROB Ver Accepted	The version of the "Rules of Behavior" the user has agreed to.
ROB Accept Dt	The date the user accepted the "Rules of Behavior" agreement.
Recall Contact?	If checked, the user has been assigned the "Recall Contact" security role for their organization. This means they will receive notifications when a material is to be recalled or held.
User Locked?	If checked, the user has been locked out of WBSCM.
User Deleted?	If checked, the user has been deleted and is not an active user.
Org ID	The business partner number assigned to the user's organization.
Org Name	The full name of the organization in WBSCM.
Org Inactive?	If checked, the organization is inactive.
Org Type	The type of organization or sub organization.
Org Address	Physical address of the organization in WBSCM.

Note: Use Download Excel (the **Download Excel** button) to view and interact with the report in Excel or Print to PDF (the **Print to PDF** button) to generate a PDF version of the report which can be printed or downloaded.

WBSCM User Security Roles

Table of Contents

1. SDA/ITO

The State Distributing Agency (SDA) and Indian Tribe Organization (ITO) is responsible for making and enforcing decisions about operations, setting up RA access in WBSCM, ensuring RA staff are trained, and providing guidance and operational support for RA activities in WBSCM.

1.1 Complaint Specialist - SDA/ITO

A user assigned the **Complaint Specialist - SDA/ITO** role may enter and review complaints submitted in WBSCM on behalf of their organization or associated RAs and Co-Ops.

- Create/Display FNS Complaints

1.2 Order Manager - SDA/ITO

A user assigned the **Order Manager - SDA/ITO** role can manage orders, maintain delivery dates for Direct-Ship and National Warehouse deliveries, perform file uploads/downloads for catalogs and orders, run entitlement/bonus reports, and perform shipment receipts on behalf of their organization or RAs.

<u>Catalog Maintenance</u>
- Display RA Catalog
- Maintain Direct-Ship Delivery Periods

<u>File Uploads/Downloads</u>
- Download Catalog
- Download Purchase Orders
- Download Sales Orders
- Upload SDA Sales Orders

<u>NW Delivery Calendar</u>
- Maintain National Warehouse Delivery Calendar
- NW Delivery Calendar Report

<u>Order Management</u>
- Consolidate Requisitions
- Domestic Order Entry
- Full Truck Load and Transfer Requests
- Redistribute Order Quantities
- Returned FNS Orders

<u>Reports</u>
- Entitlement/Bonus Summary Report
- RA Entitlement/Bonus Detail Report
- SDA Entitlement/Bonus Detail Report

Shipment Receipts

- Enter Shipment Receipt
- Upload Shipment Receipt

1.3 Org Admin - SDA/ITO

A user assigned the **Org Admin - SDA/ITO** role can maintain organization data, create and maintain users at both the SDA and RA level, maintain catalog views, and manage RA entitlement.

Catalog Maintenance

- Display RA Catalog
- Manage RA Catalog Views

Entitlement Management

- SDA Entitlement Budgeting for CACFP
- SDA Entitlement Budgeting for NSIP
- SDA Entitlement Budgeting for NSLP
- SDA Entitlement Budgeting for SFSP
- SDA Entitlement Budgeting for TEFAP

File Uploads/Downloads

- Download Catalog

Manage Users

- Manage Users
- User Security Report

Organization Maintenance

- Create RA Organization
- Update RA Organization
- Create Co-op Organization
- Update Co-op Organization
- Mass Assign/Un-assign Ship-To
- Update my Organization
- Upload New RA Organization
- Upload RA Updates

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1.4 Recall Contact - External

A user assigned the **Recall Contact – External** role is flagged as an SDA/ITO contact that should receive recall notifications from WBSCM (via email, phone, or SMS text message) in the event of a recall.

1.5 Recall Specialist - SDA/ITO

A user assigned the **Recall Specialist - SDA/ITO** role can view recall information in WBSCM and complete the Recall Survey Response Form for recalls in which the SDA/ITO is impacted.

- Access Recall Survey Response Form
- Display FNS Recall
- View Business Partners Impacted by Recall

1.6 User Admin - SDA/ITO

A user assigned the **User Admin – SDA/ITO** role can create new users as well as update contact information and assigned roles for users within the SDA/ITO organization. They may also deactivate user accounts for their organization that are no longer needed.

- Manage Users
- User Security Report

1.7 View-Only - SDA/ITO

A user assigned the **View-Only - SDA/ITO** role has access to order management, material pricing, and entitlement reports.

- Domestic Price Support Report
- Domestic Ship-To Contacts Report
- Entitlement/Bonus Summary Report
- List of Materials
- Material Outlay Report
- Material Pricing Report
- Multi-Food Received Shipment Report
- Multi-Food Requisition Report
- NW Delivery Calendar Report
- Order Status Report
- Processing Status Report
- RA Entitlement/Bonus Detail Report
- Received Shipment Report
- Redistribution/Redonation Detail Report
- Requisition Status Report
- SDA Entitlement/Bonus Detail Report

- Stocks at Subcontractor
- Value of Commodities Received - RA
- Value of Materials Received - Domestic & Price Support
- Value of Materials Received - Multi-Food

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2. Recipient Agency (RA)

The Recipient Agency (RA) is responsible for creating requisition orders and performing shipment receipts in WBSCM in coordination with its SDA/ITO.

2.1 Order Manager - RA

A user assigned the **Order Manager - RA** role can create requisition orders, run the National Warehouse (NW) Delivery Calendar Report, run entitlement/bonus reports, and perform shipment receipts.

Order Management

- Domestic Order Entry

NW Delivery Calendar

- NW Delivery Calendar Report

Reports

- Entitlement/Bonus Summary Report
- RA Entitlement/Bonus Detail Report

Shipment Receipts

- Enter Shipment Receipt
- Upload Shipment Receipt

2.2 Org Admin - RA

A user assigned the **Org Admin - RA** role can maintain organization data and view users assigned to its organization.

- Maintain Organization
- Manage Users
- User Security Report

2.3 User Admin - RA

A user assigned the **User Admin - RA** role can create new users as well as update contact information and assigned roles for users within their RA organization. They may also deactivate user accounts that are no longer needed.

- Manage Users
- User Security Report

2.4 View-Only - RA

A user assigned the **View-Only - RA** role has access to order management, material pricing, and entitlement reports.

- Domestic Ship-To Contacts Report
- Entitlement/Bonus Summary Report
- List of Materials
- Material Pricing Report
- Multi-Food Received Shipment Report
- Multi-Food Requisition Report
- RA Entitlement/Bonus Detail Report
- Redistribution/Redonation Detail Report
- Requisition Status Report
- Value of Commodities Received - RA
- Value of Materials Received - Multi-Food

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3. Co-op

The Co-op organization (if set up by the SDA) may place requisition orders on behalf of member RAs and review/consolidate RA requisitions before submission to the SDA for approval.

3.1 Order Manager - Co-op

A user assigned the **Order Manager - Co-op** role can create/manage orders and perform shipment receipts on behalf of their RAs.

Order Management

- Consolidate Requisitions
- Domestic Order Entry

Shipment Receipts

- Enter Shipment Receipt
- Upload Shipment Receipt

3.2 Org Admin - Co-op

A user assigned the **Org Admin - Co-op** role can maintain organization data and view users assigned to its organization and its RAs.

- Maintain Organization
- Manage Users
- User Security Report

3.3 User Admin - Co-op

A user assigned the **User Admin - Co-op** role can create new users as well as update contact information and assigned roles for users within their own Co-op organization. They may also deactivate user accounts for their organization that are no longer needed.

- Manage Users
- User Security Report

3.4 View-Only - Co-op

A user assigned the **View-Only - Co-op** role has access to order management and entitlement/bonus reports.

- Domestic Ship-To Contacts Report
- Entitlement/Bonus Summary Report
- Multi-Food Received Shipment Report
- Multi-Food Requisition Report
- RA Entitlement/Bonus Detail Report

- Received Shipment Report
- Redistribution/Redonation Detail Report
- Requisition Status Report
- Value of Commodities Received – RA
- Value of Materials Received - Domestic & Price Support
- Value of Materials Received - Multi-Food

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4. HQ Receiver

The HQ Receiver organization is responsible for managing shipment receipts for a group of ship-to locations.

4.1 Org Admin - HQ

A user assigned the **Org Admin - HQ** role can download catalogs, perform shipment receipts, and view organization and user data for its own organization.

File Uploads/Downloads

- Download Catalog

Shipment Receipts

- Enter Shipment Receipt
- Upload Shipment Receipt

Maintain Organization

- Display My Organization

Manage Users

- Manage Users
- User Security Report

4.2 Org Admin - Processor HQ

A user assigned the **Org Admin - Processor HQ** role can perform inventory allocations and run Processing reports. This role is assigned by FNS.

- Inventory Dashboard
- Processing Status Report
- Processor Request Report

4.3 User Admin - HQ

A user assigned the **User Admin - HQ** role can create new users as well as update contact information and assigned roles for users within their own organization. They may also deactivate user accounts for their organization that are no longer needed.

- Manage Users
- User Security Report

4.4 View-Only - HQ

A user assigned the **View-Only - HQ** role has access to order management and material pricing reports.

- List of Materials
- Material Pricing Report
- Multi-Food Received Shipment Report
- NW Delivery Calendar Report
- Order Status Report
- Received Shipment Report
- Redistribution/Redonation Detail Report
- Requisition Status Report
- Stocks at Subcontractor

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5. Domestic Ship-To

The Ship-to organization is responsible for performing shipment receipts in WBSCM in coordination with the SDA/RA or ITO.

5.1 Org Admin - Domestic Ship-To

A user assigned the **Org Admin – Ship-To** role can download catalogs, perform shipment receipts, and view organization and user data for its own organization.

- Download Catalog
- Enter Shipment Receipt
- Maintain Organization (Display My Organization)
- Manage Users
- Upload Shipment Receipt
- User Security Report

5.2 Org Admin - Processor

A user assigned the **Org Admin - Processor** role can perform inventory allocations and run Processing reports. This role is assigned by FNS.

- Inventory Dashboard
- Processing Status Report
- Processor Request Report

5.3 User Admin - Domestic Ship-To

A user assigned the **User Admin – Domestic Ship-To** role can create new users as well as update contact information and assigned roles for users within their own ship-to organization. They may also deactivate user accounts for their organization that are no longer needed.

- Manage Users
- User Security Report

5.4 View-Only - Domestic Ship-To

A user assigned the **View-Only - Domestic Ship-To** role has access to order management and material pricing reports.

- List of Materials
- Material Pricing Report
- Multi-Food Received Shipment Report
- NW Delivery Calendar Report

- Order Status Report
- Received Shipment Report
- Redistribution/Redonation Detail Report
- Requisition Status Report
- Stocks at Subcontractor

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7. National Warehouse (NW)

The National Warehouse (NW) is responsible for provisioning commodities for multi-food orders and managing multi-food inventory in WBSCM.

7.1 Org Admin - National Warehouse

A user assigned the **Org Admin – National Warehouse** role can perform shipment receipts for replenishment orders, maintain NW delivery calendar, perform warehouse management transactions, and view user data for its own organization.

- Order Processing
    - Shipment Receipts
        - Enter Shipment Receipt
        - Upload Shipment Receipt
    - NW Delivery Calendar
        - Maintain National Warehouse Delivery Calendar
        - NW Delivery Calendar Report
- Warehouse Management
    - Delivery Management
        - Outbound Delivery Monitor
    - Inventory Management
        - Block Stock
        - Display Material Document
        - Display Warehouse Stocks of Material
        - Stock on Posting Date
        - Stock Overview - Display Inventory
    - Batch Management
        - Batch Information Cockpit
        - Batch Where-Used List
        - Display Inventory Batch
        - Modify Inventory Batch
        - View MRP Created PRs
    - File Uploads/Downloads
        - National Warehouse Orders to be Filled
        - Upload BOLs from National Warehouse
        - Upload National Warehouse Inventory
- Manage Users
- User Security Report

7.2 User Admin - National Warehouse

A user assigned the **User Admin - National Warehouse** role can create new users as well as update contact information and assigned roles for users within their own NW organization. They may also deactivate user accounts for their organization that are no longer needed.

- Manage Users
- User Security Report

7.3 View-Only - National Warehouse

A user assigned the **View-Only - National Warehouse** role has access to NW inbound/outbound order reports and material pricing reports.

- List of Materials
- Material Pricing Report
- Multi-Food Received Shipment Report
- Multi-Food Requisition Report
- National Warehouse Replenishment Report

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8. Third-Party Barter (SEAM)

8.1 Org Admin - Third-Party Barter

A user assigned the **Org Admin - Third-Party Barter** role can download sales order and update orders via the Mass Order update screen.

- Download Sales Order
- Mass Order Update

8.2 User Admin - Third Party Barter

A user assigned the **User Admin - Third-Party Barter** role can create new users as well as update contact information and assigned roles for users within their own organization. They may also deactivate user accounts for their organization that are no longer needed.

- Manage Users
- User Security Report

8.3 View-Only - Third Party Barter

The **View-Only - Third-Party Barter** role currently provides no additional views or reports for users. For this reason, this security role does not need to be assigned.

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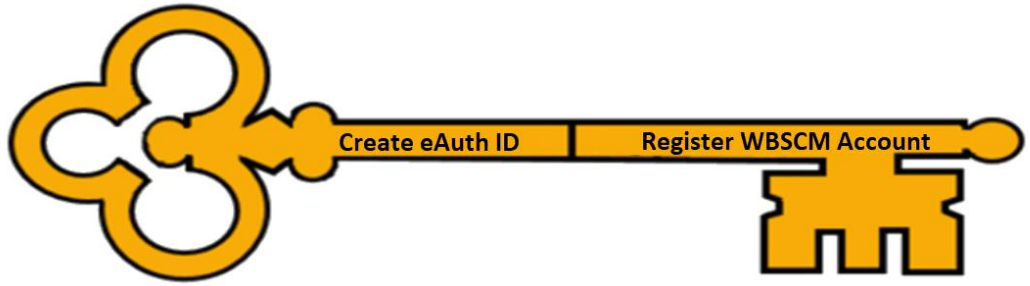
WBSCM New User Registration Job Aid



A WBSCM account must **first** be created by the **User Administrator** or the user's organization. Once this account is created, WBSCM automatically generates a registration email that is sent to the user with steps to create an eAuthentication (eAuth) ID and link it to their WBSCM account. This email should be saved until the eAuth ID has successfully been linked to the WBSCM account(s).

Create eAuth ID

Step 1: Create new eAuth ID

(If an existing eAuth ID exists, skip to Step 2 of the Registration email.)

- Enter a unique email address that has not previously been associated with an eAuth ID (such as for previous access to WBSCM).
- Select the appropriate type of eAuth ID based on the user's role:
  - Customer/Vendors/Business Partners → **Customer**
  - USDA Federal Employees/Affiliates/Contractors → **USDA Employee/Contractor**
  - USAID Federal Employees/Affiliates/Contractors → **Other Federal Employee/Contractor**
- <u>The registration link is only valid for 30 minutes</u>; this link can be resent from the eAuth website.
- **USAID Internal users** must complete Identity Verification. From the eAuth Update Account page, select **Verify My Identity**, accept the terms of service, and provide the required information. In-person identity verification is available at USDA Service Center/Local Registration Authority (LRA) location.

Register WBSCM Account

Step 2: Link to WBSCM

- Click the unique link listed under Step 2 of the WBSCM Account Registration email.
- Accept the Rules of Behavior to link the eAuth ID and WBSCM account. If the Rules of Behavior are not accepted the WBSCM account gets locked.
- An active eAuth ID can be linked to more than one WBSCM account. Upon logging into future WBSCM sessions, the user can select the desired account from a Selection screen. If a desired WBSCM account is not listed on the Selection screen, it may be due to one of the following reasons:
  - The Rules of Behavior have not been accepted
  - There is a Last Name and Email Address mismatch between the eAuth ID and the WBSCM Account
  - The WBSCM Account is locked/inactive
  - The WBSCM Account is a legacy account (prior to 6/26/2020)

Helpful Tips:

- <u>Chrome is the recommended browser for the registration process</u>.
- Bookmark the WBSCM website: https://portal.wbscm.usda.gov/

Additional available resources:

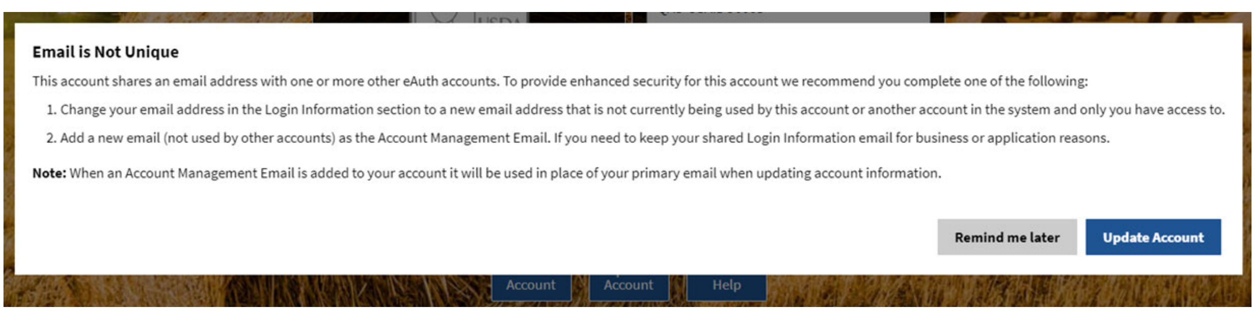
- WBSCM New User Registration Video
- eAuthentication Tips and Support Job Aid
- Multiple WBSCM Account Registration Job Aid

<u>New eAuth IDs require a unique email address as the User ID</u>. Existing eAuth IDs (created before June 26,2020) remain unchanged, even if they were set up with non-unique email addresses.

This job aid includes information on the following topics:

(1) About eAuthentication

a. eAuth is a USDA system used to manage identity and login credentials for a variety of Department applications, including WBSCM. The same eAuth ID may be used to access different systems.
b. eAuth IDs are set up for individuals not organizations. When setting up a new eAuth ID, users are prompted to provide their own name and email address.
c. A user may create more than one eAuth ID as long as a unique email address is used for each. The unique email address becomes the eAuth User ID.
d. If the email address associated with a new eAuth account is updated, the User ID will also change.
e. For legacy eAuth IDs, if the email address is not unique, the user will see the following **Email is Not Unique** warning prompt each time they log in, informing them of the option to enter a unique Account Management Email (AME). This email is used for password resets and similar activities. The warning will no longer appear after an AME is entered.



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(2) eAuth ID and WBSCM Accounts

a. In order to establish the link between eAuth and WBSCM, the last name and email must match <u>exactly</u>, including any spaces and punctuation. When setting up a new eAuth ID, refer to the WBSCM registration email to see how the last name and email were entered in the WBSCM profile; if this is incorrect, the user should contact the user administrator for their organization to update the WBSCM profile before proceeding.

b. During the registration process, users must also accept the WBSCM Rules of Behavior to successfully link the eAuth ID to their WBSCM account. If the user does not accept, the WBSCM account gets locked. To regain access, users should contact their user administrator.

c. Users can have more than one WBSCM account if they support different organizations. Multiple WBSCM accounts can be linked to the same eAuth ID. During WBSCM login, the user can select which account they would like to access.

d. If the desired WBSCM account does not appear on the selection screen, it may be locked OR the email address and/or last name do not match between the eAuth ID and the WBSCM accounts. To update the WBSCM account, users should request assistance from their user administrator.

e. For more information on how to link multiple WBSCM accounts to a single eAuth ID, refer to the Multiple WBSCM Account Registration job aid.

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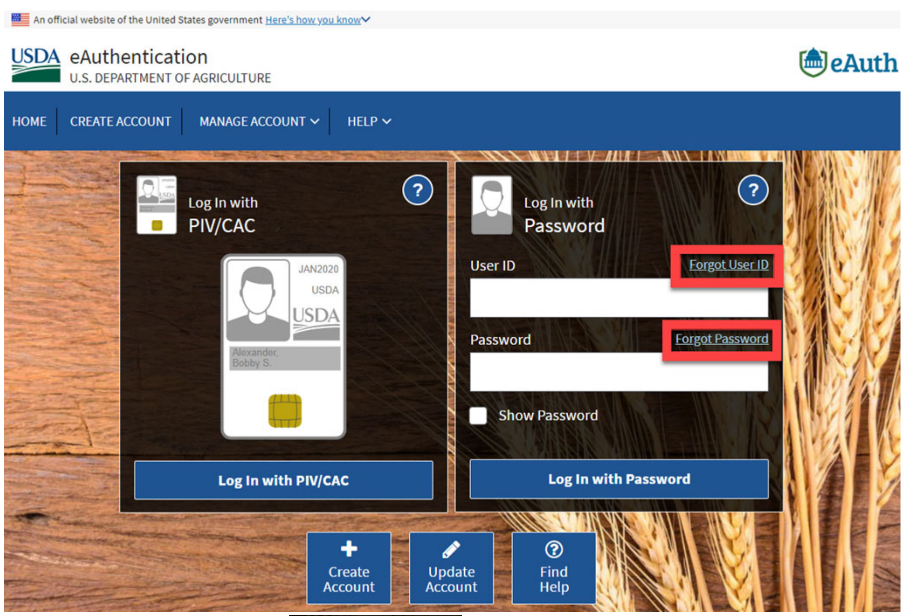
(3) eAuth User ID and Password Recovery

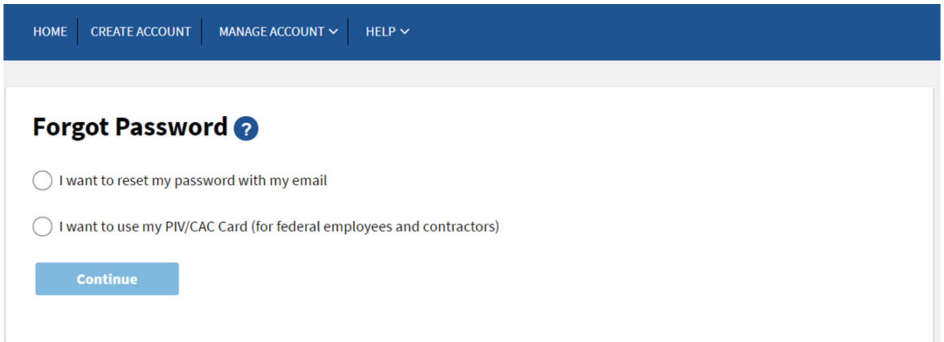
a. Self-service tools are accessible from the eAuth login dialog and on the eAuth Help webpage.

b. To recover forgotten eAuth User ID(s), click Forgot User ID (the **Forgot User ID** link) next to User ID. The user must know the First Name, Last Name, and Email associated with the eAuth account, and they must also have access to that email account.

c. After providing the requested information, users will receive their User ID(s) at the email address associated with the eAuth ID.

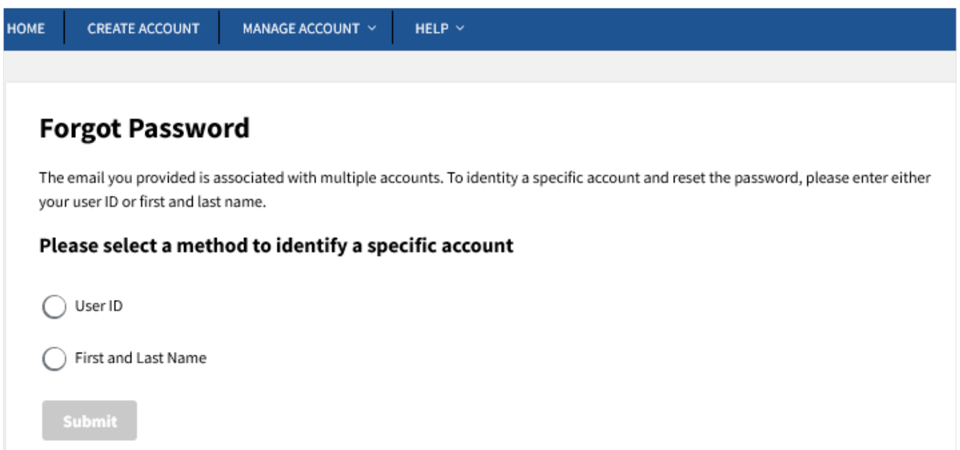


d. To reset a forgotten **Password**, click Forgot Password (the **Forgot Password** link) and select the desired reset method.



e. Customers and USDA Employees/Contractors who forget their password may use the email reset option to recover their password. The user must know and have access to the email account associated with the eAuth ID; they will receive further instructions by email.

f. After clicking the **Reset Password** link in the email, users may be prompted to select the eAuth account by User ID or by First and Last Name, if there is more than one legacy eAuth ID using the same email address. If the email is associated with multiple eAuth IDs, the user must also know either the User ID or the First and Last Name.



g. USDA Employees/Contractors may also use their LincPass card to reset their forgotten password. After entering the PIN and successfully authenticating, the user is taken to their eAuth account profile to enter a new password for the account.

h. In the event a user does not know the User ID and cannot use the recovery methods above, they should request assistance from their User Admin, if:

- The user cannot access email associated with the account, or
- The email address is associated with more than one account, and
    1. The user cannot recall the User ID
    2. The user cannot recall the First/Last Name

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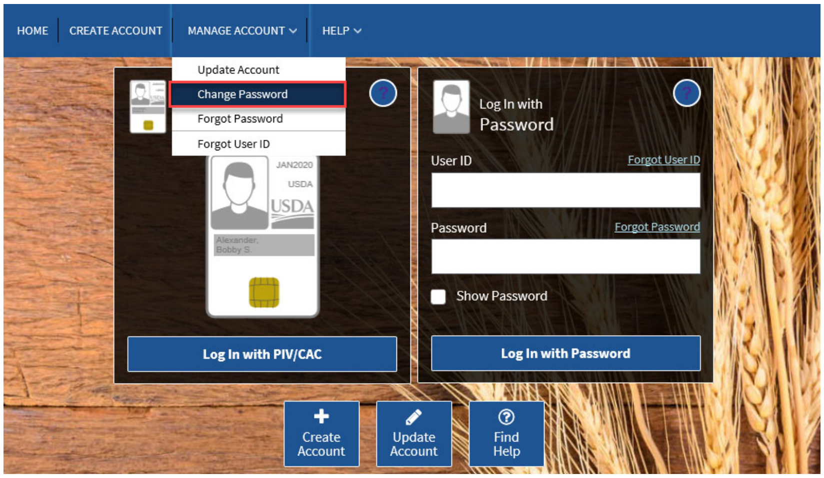
(4) eAuth ID Maintenance

a. Inactive eAuth IDs will be disabled after 400 days of inactivity. Users will not be notified by the eAuth system when this occurs. Users should log in to WBSCM at least once per calendar year for each user profile to stay active. If the user has forgotten their User ID and/or Password, they may use the self-service recovery tools described in eAuth User ID and Password Recovery.

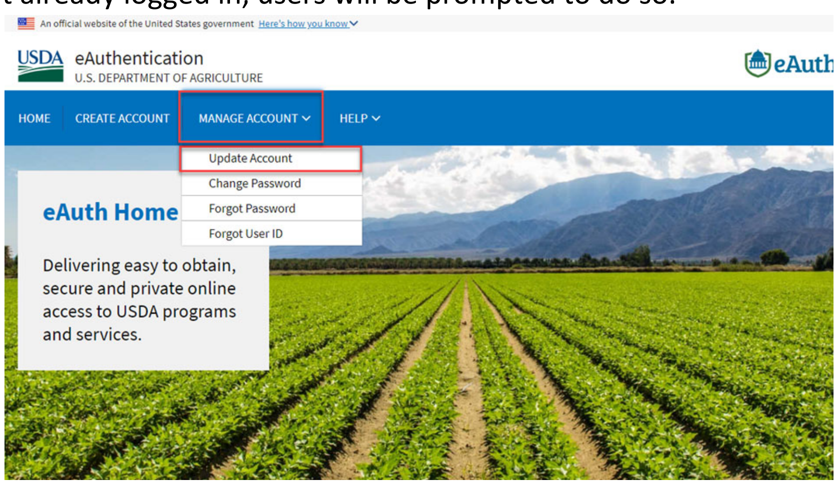
b. Passwords, including those for legacy eAuth IDs, do not expire.

c. Users may change their password at any time using MANAGE ACCOUNT (the **Manage Account** dropdown) on the eAuth banner. The user must know their current password to use this tool.



d. After logging in, legacy users may be prompted to update other eAuth profile information. These requests are not phishing attempts.

e. Users can update profile information for their eAuth ID. On the eAuth Home webpage, select Update Account (the **Update Account** link) from the MANAGE ACCOUNT (the **Manage Account** dropdown). If not already logged in, users will be prompted to do so.



f. After making any changes to the eAuth profile or password, users should log out and close the browser. Then, log in to WBSCM to confirm access is still valid.

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(5) Online Identity Verification Process

a. The Online Identity Verification process is a new feature that allows users to verify their identity online to enable access to restricted applications (known as "Level 2" prior to June 26, 2020). For some users, this may eliminate the need to visit a Local Registration Authority (LRA) location.
b. USAID Internal users must complete Identity Verification to use WBSCM. Log in to the eAuth Update Account page, select **Verify My Identity,** accept the terms of service, and provide the required information.
c. If it is required for their role, after logging in to WBSCM, users can conveniently complete the Online Identify Verification process online. The eAuth F.A.Q. contains additional information.
d. Alternatively, users may complete the identity verification process at a USDA Service Center/Local Registration Authority (LRA) location.
e. To complete the process online, the Terms of Service must be accepted. Choosing not to accept the Terms of Service and exiting will opt the user out of the online verification process.
f. After accepting the Terms of Service, the system prompts the user to complete the account profile form. Date of Birth and Social Security Number are required; the verification process will search for a matching identity through Experian. Then, the user must answer five questions. Afterwards, they will receive an email to confirm successful completion of identity verification.
g. Reasons for unsuccessful Online Identity Verification include insufficient data to generate the identity verification questions, incorrect answers by the user, or too many attempts.

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(6) eAuth Help Resources

a. eAuth Home Page: https://www.eauth.usda.gov/home
b. eAuth Contact Us: https://www.eauth.usda.gov/eauth/b/usda/contactus
c. eAuth F.A.Q.: https://www.eauth.usda.gov/eauth/b/usda/faq

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(7) Related WBSCM Help Resources

a. WBSCM New User Registration job aid
b. Multiple WBSCM Account Registration job aid
c. WBSCM New User Registration video

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PROCESS OVERVIEW

Purpose

Use this procedure to review and update user profile information if there is a change of address or communication information, including email address (required) and alternate methods. Any WBSCM user may follow these steps to update contact information and notification preferences in their own user profile. User Administrators (User Admins) create the initial user profile in WBSCM, and can also update the contact information for the user using the Maintain User Profile transaction.

Process Trigger

Perform this procedure when:

- a user has a name or address change
- a user needs to update communication methods.

Users may only update their own profile. This process is intended to be done by an individual WBSCM user.

Prerequisites

- The WBSCM user must exist in the system.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab ➔ **Manage Users** folder ➔ **Maintain User Profile** link.

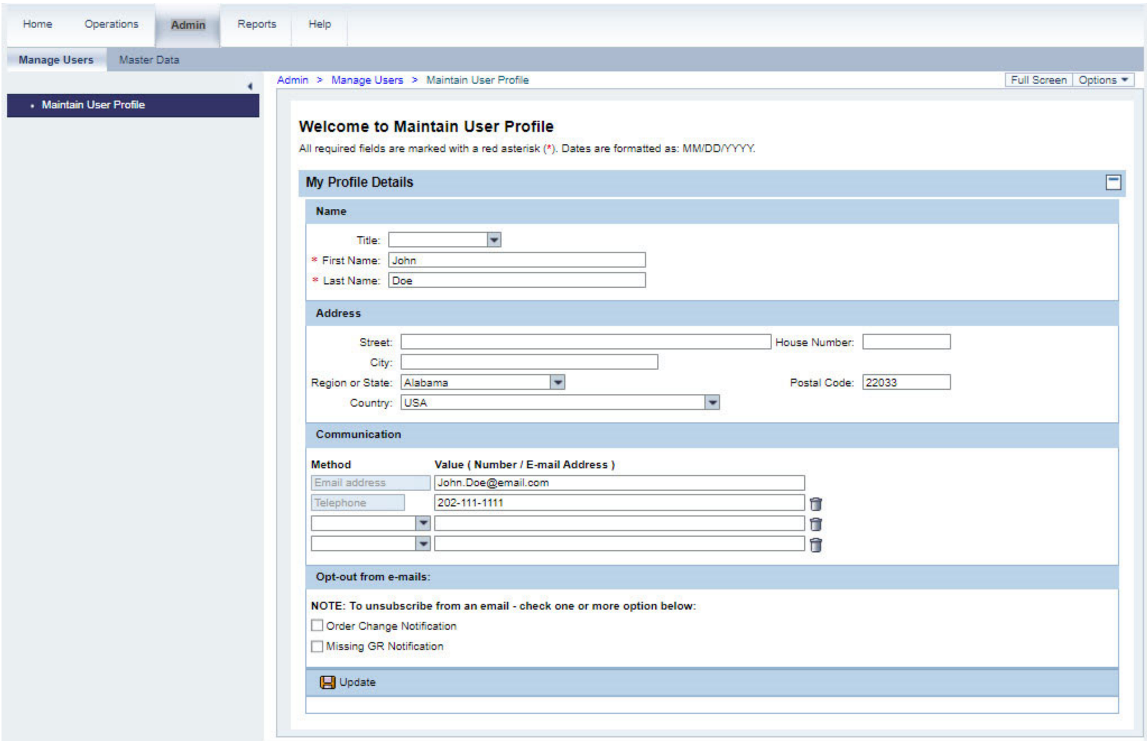
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, Frequently Referenced Training Materials section for basic navigation training and tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path **Admin** tab ➔ **Manage Users** folder ➔ **Maintain User Profile** link.

Image: Maintain User Profile Screen

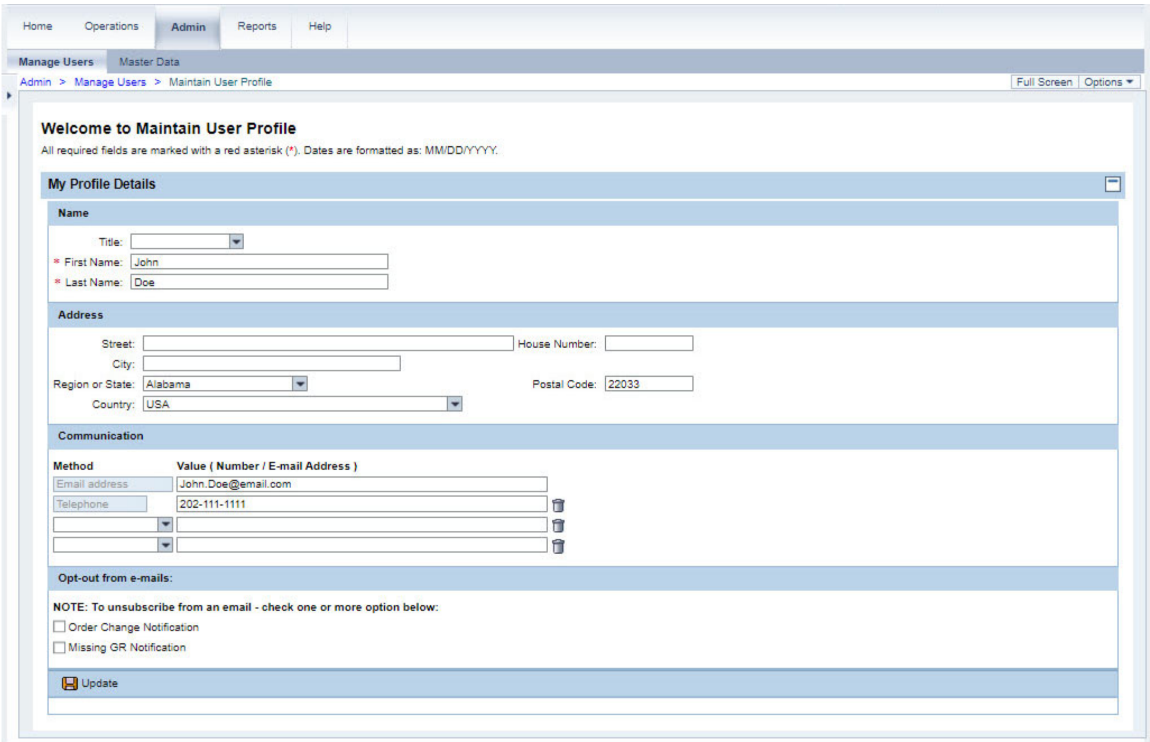


2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. This can be done for all transactions in WBSCM.

(Note) Recall Contacts have an additional section at the bottom of the screen used to enter preferred communication method in case of recall. For instructions to review or edit the recall communication methods, Recall Contacts should use the **Maintain Recall Notification Preferences** work instruction.

(Note) Upon opening the user profile, users will see the information added by the User Administrator at the time of creating the profile. The user can edit these fields as appropriate.

Image: Maintain User Profile Screen



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

Field	R/O/C	Description
Title:	O	Mr., Mrs., Ms., Miss, or Dr. **Example:** Mr.
First Name:	R	First name of the user. **Example:** John
Last name:	R	Last name of the user. **Example:** Doe
Street:	O	A free text field in which to enter the street address of the user or organization. **Example:** 123 Main Street

Field	R/O/C	Description
House Number:	O	The street number of a house or building, as applicable.
City:	O	City where the user or company is located. **Example:** Mobile
Region / State:	R	The State, District, Province, County, or other regional locale. **Example:** Alabama (Note) The **Region / State** field is dynamically related to the Country field, and will display states or regions relevant to the country selected. To locate the correct region or state, the user must first select the correct country.
Postal Code:	R	A ZIP code. **Example:** 12345
Country	R	Country code that represents country name. **Example:** USA

4. Perform one of the following:

If	Then
The user needs to add a new Communication Method	1. Click (the **Method** drop-down) to select the communication method. 2. Enter the value in the **Value (Number / E-mail Address)** field. (Note) The **Method** for the first line in this section is for Email Address and cannot be changed. This is a required field.
The user needs to edit the value of an existing Communication Method	1. Click in the **Value (Number / E-mail Address)** field for the existing communication method.

If	Then
	2. Type the new value.
The user needs to change or delete an existing Communication Method	Click (the **Trash Can** icon) to clear saved fields. (Note) To add a new Communication Method to replace the one removed, see steps above.
The user does not need to make any changes to Communication Methods	Go to Step 6.

(Note) All users are required to enter an email address as a Communication Method; additional methods are optional.

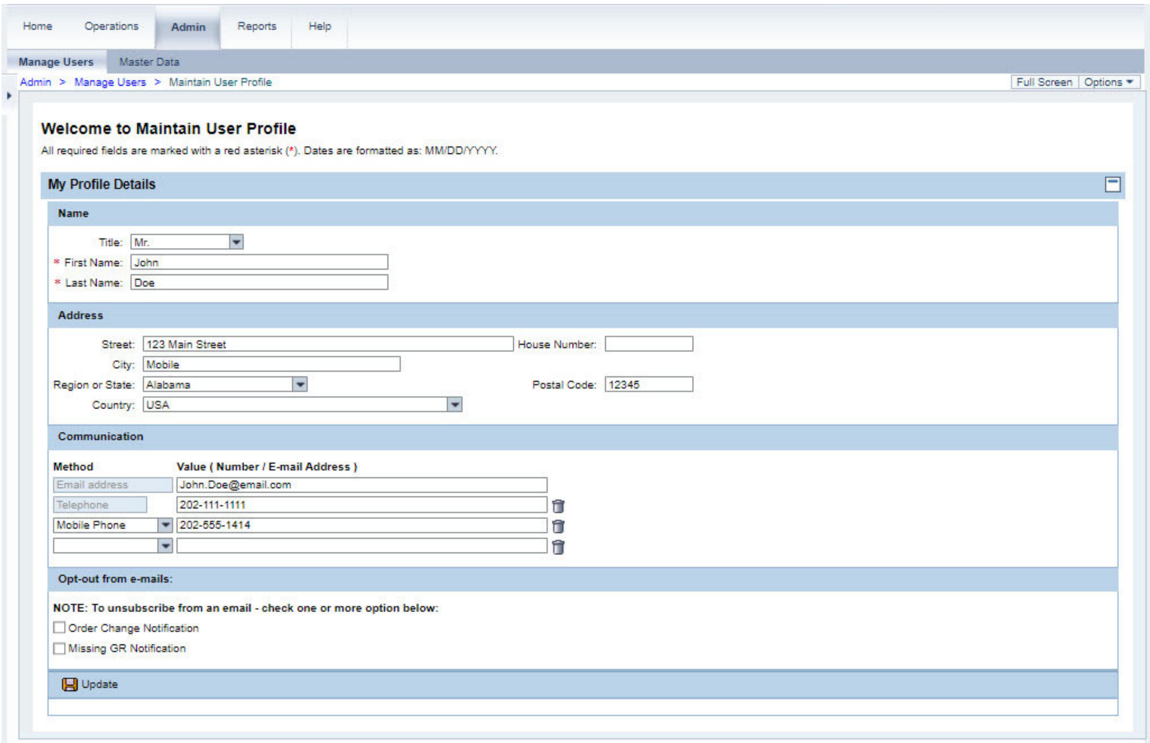
(Note) In this transaction, **Method** refers to a communication method. Users may select from **Fax Number**, **Email Address**, **Mobile Phone**, and **Telephone.**

5. If applicable, review and update the user preferences in the *Opt-out from emails:* sectio

(Note) The **Order Change Notification** checkbox applies to Order Managers. If the **Order Change Notification** checkbox is selected, the user will not receive notifications.

(Note) The **Missing GR Notification** checkbox applies to SDA Order Managers, Ship-to, HQ, and NW Org Admins. If the **Missing GR Notification** checkbox is selected, the user will not receive notifications.

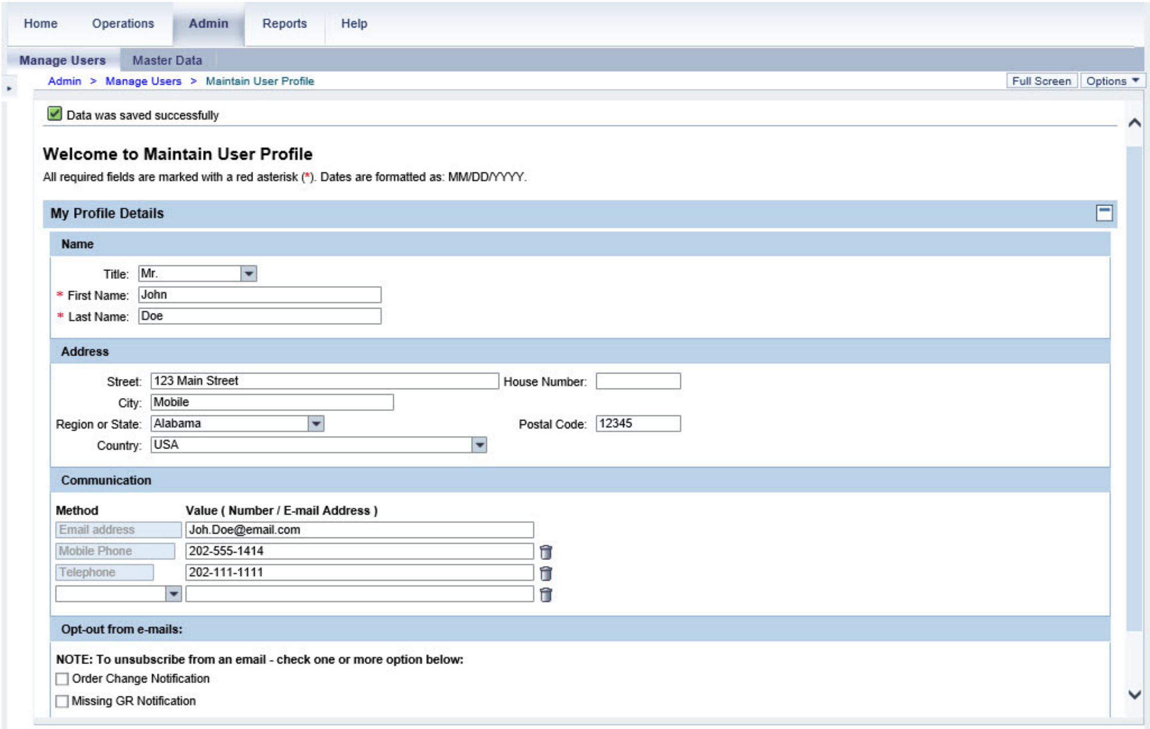
Image: Maintain User Profile Screen



6. Click Update (the **Update** button).

(Note) A confirmation message "Data was saved successfully" displays.

Image: Maintain User Profile Screen



7. The transaction is complete.

RESULT

The User Profile has been reviewed and updated, including changes to name, address, contact methods, and subscriptions. Users who are Recall Contacts may also have updated their Recall Communication Method settings. All updates entered by an individual user will be applied to the user's profile in the Maintain User Profile transaction (for User Admins) as well.