

WBSCM User Administration Job Aid

(Not intended for Corporate Vendor Administrators)

New User Creation Process in WBSCM

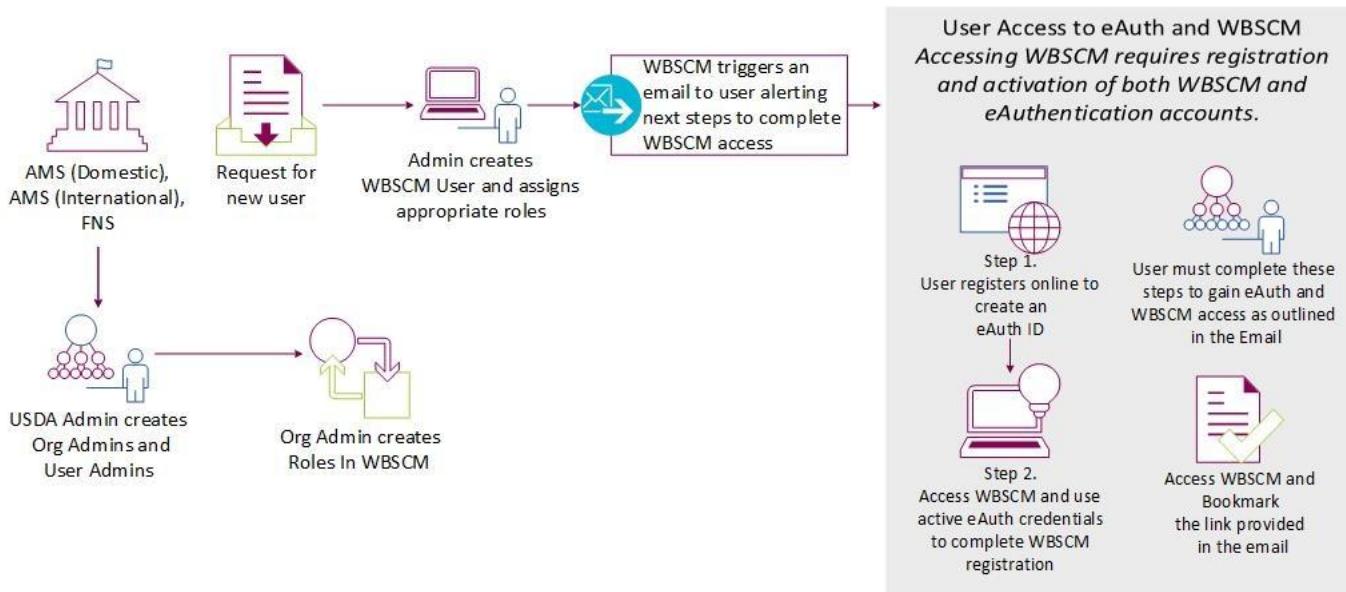
This job aid provides an overview of the WBSCM new user creation process, the USDA WBSCM organization and sub-organization structure, and the differences between an Organization Administrator (Org Admin) and a User Administrator (User Admin).

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

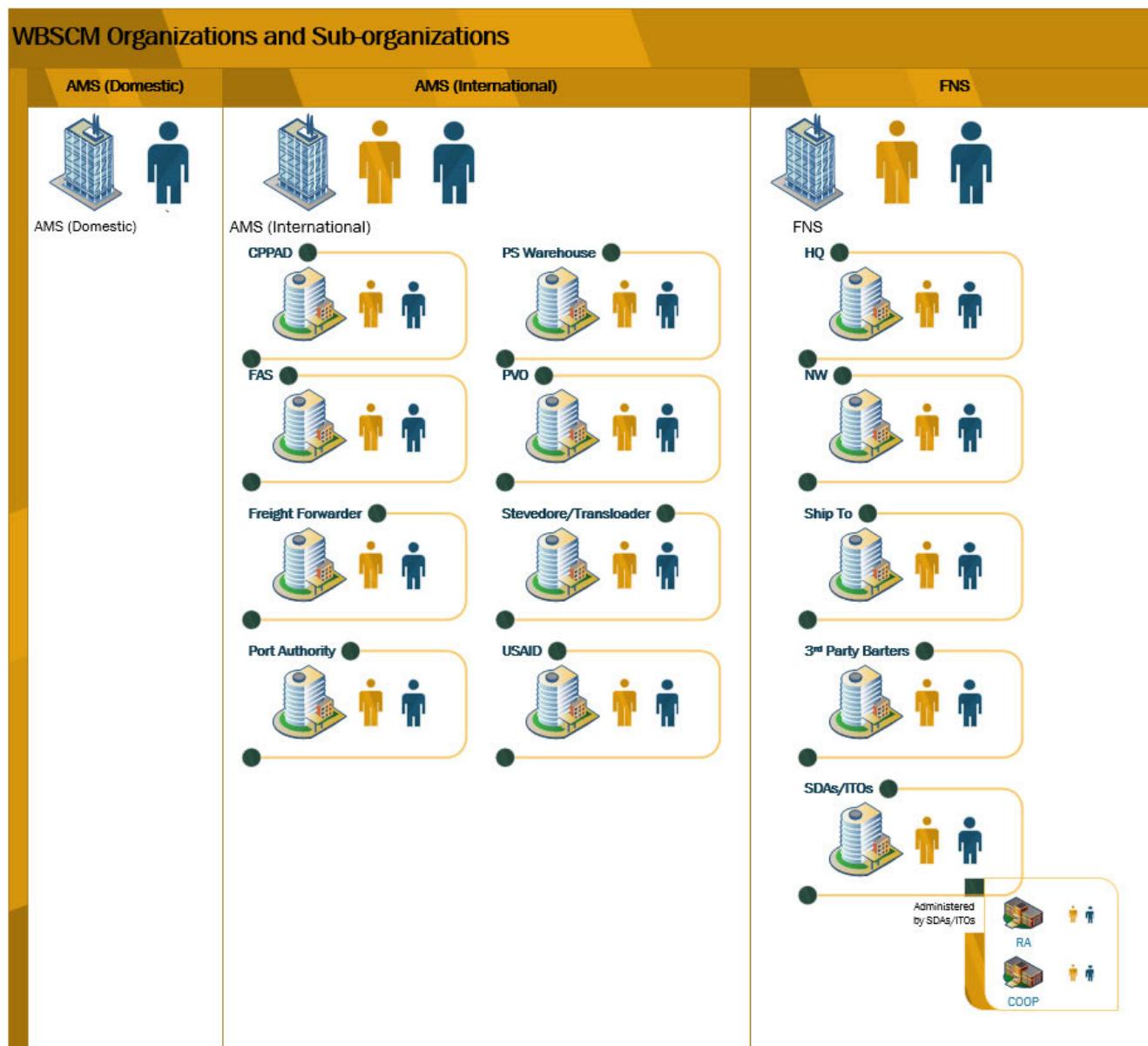
Every WBSCM user is assigned to a USDA organization and/or a sub-organization. Based on the organization/sub-organization assignment, new users are assigned one or more roles, which determines their level of access to WBSCM functions.

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 Admins are responsible for creating and maintaining sub-organizations. Org Admins can also create and maintain users for their sub-organizations, including assigning all applicable roles.



User Admins are responsible for creating and maintaining user roles in WBSCM for users within their organization.

Org Administration Tasks

Org Admin Same Level Tasks

Create Sub-organizations



Sub-org

Sub-org

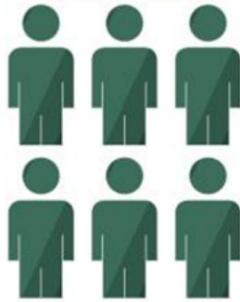
Sub-org

Sub-org

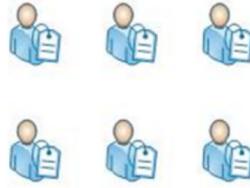
Sub-org

Org Admin Sub-organization Level Tasks

Create Users

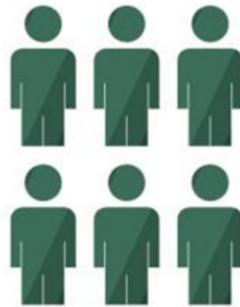


Assign Roles



User Administration Tasks

Create Users



Assign Roles



Maintain Users



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.

First Name	Last Name	Last Logon Date
SDA	ALLROLES	2016-10-22 13:46:52
Kale	AllRoles	2016-09-7 14:49:15
SDA	AllRoles	
SDA	AllRolesEmail	2016-09-7 10:42:03
SDA	Complaint Specialist	2016-10-8 15:39:01
SDA	Complaint Specialist	2016-10-20 10:22:05
Corey	DeLeon	2017-02-6 09:28:33

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.

First Name	Last Name	Last Logon Date
Carrie	Alexander	2017-01-18 09:06:59
FSA	AllRolesFAS	2016-09-24 14:39:33
Order	Approver	2016-04-5 11:06:11
Daren	Arrington	2017-03-2 13:12:29
Dennis P	Atkins	2017-10-20 10:22:05
Jennifer L	Barnard	2017-02-4 07:34:40
Donna	Bauer	2017-03-3 13:18:21

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

First Name	Last Name	Last Logon Date
User Admin	AMS	2018-07-10 10:02:15
James	Akhanna	2017-03-1 12:35:02
Kimberly	Allen	2014-06-12 12:56:42
Richard	Armstrong	2012-11-27 13:58:43
Anita	Atkins	2011-12-13 08:34:48
Joan	Avila	2012-02-2 09:56:13
Rex	Barnes	

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.

First Name	Last Name	Last Logon Date
Cathy	Smith	2017-03-7 08:01:10

User Details

Personal Data

Company:	0004000302	Street Address:	1400 Independence Ave., SW
User ID:	SMITHC0001	City:	Washington
Title:	Ms.	Zip Code:	20250
First Name:	Cathy	Country:	USA
Last Name:	Smith	State Or Province:	District of Columbia
Email:	Catherine.Smith@ams.u	Time Zone:	Eastern Time (New York)
Fax:			
Mobile Phone:			
Phone:			

Role Data

Admin Data

Buttons: Modify User, Delete User

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

User Details

Personal Data		Role Data		Admin Data	
Company:	0004000302	Street Address:	1400 Independence Ave., SW	City:	Washington
User ID:	SMITHC0001	Zip Code:	20250	Country:	USA
Title:	Ms.	State Or Province:	District of Columbia	Time Zone:	Eastern Time (New York)
First Name:	Cathy				
Last Name:	Smith				
Email:	Catherine.Smith@ams.u				
Fax:					
Mobile Phone:					
Phone:					

Modify User **Delete User**

Update Role Assignment:

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

User Details

Personal Data		Role Data		Admin Data	
Current Roles:					
<ul style="list-style-type: none">Org Admin - AMSDom Loss/Damage Approve/Post - AMSDom Loss/Damage Create/Edit - AMSCOR - AMSInvoice Approver - FSA DOMRecall Specialist - AMSInvoice Approver - AMS					

Modify User **Delete User**

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

User Details

Personal Data		Role Data		Admin Data	
User Locked:	<input type="checkbox"/>				
Reason Locked:	<input type="text"/>				
Resend New User Email					

Modify User **Delete User**

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.

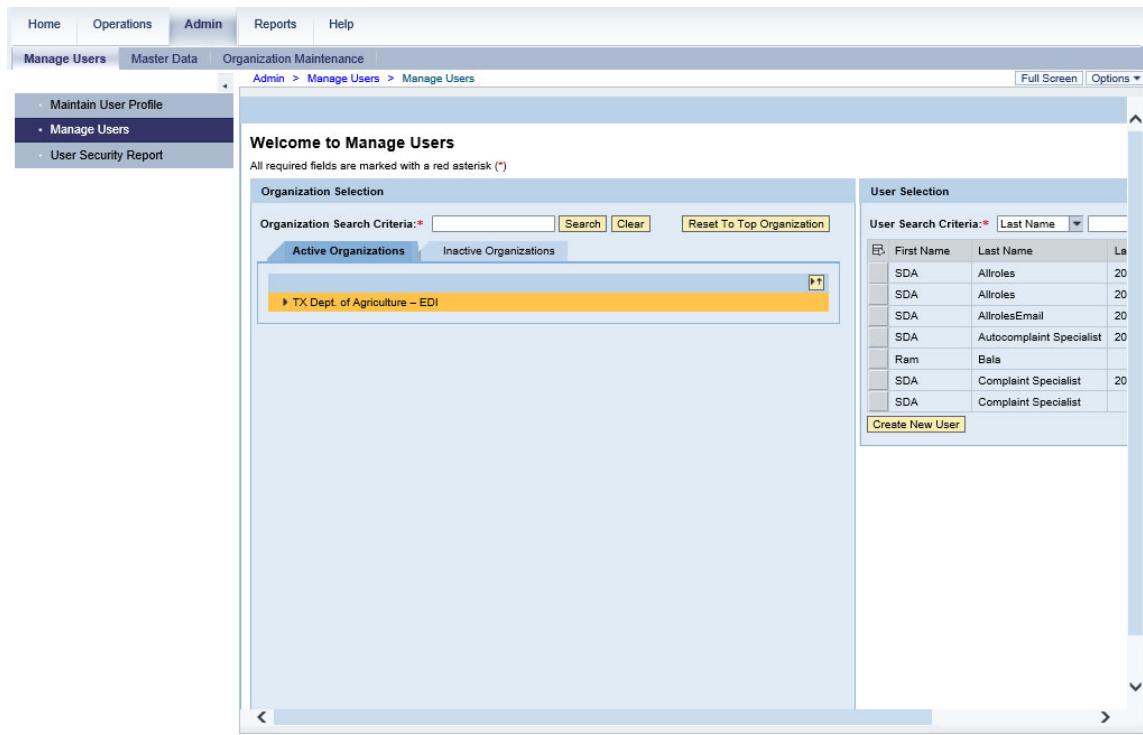
Tips and Tricks

- 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



User Selection
User Search Criteria: * Last Name
First Name Last Name La
SDA Allroles 20
SDA Allroles 20
SDA AllrolesEmail 20
SDA Autocomplaint Specialist 20
Ram Bala
SDA Complaint Specialist 20
SDA Complaint Specialist

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

First Name	Last Name	Last Logon Date
SDA	Allroles	2021-06-8 13:00:55
SDA	Allroles	2020-10-15 08:08:16
SDA	AllrolesEmail	2019-02-13 08:55:53
SDA	Autocomplaint Specialist	2019-02-14 09:34:42
Ram	Bala	
SDA	Complaint Specialist	2021-04-27 12:42:28
SDA	Complaint Specialist	

3. Perform one of the following:

If

Admin needs to create a new user for a sub-organization.

Then

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

The screenshot shows the 'Manage Users' screen with the 'Admin' tab selected. The 'Organization Selection' panel on the left displays a tree view of organizations, with 'TX Dept. of Agriculture – EDI' expanded. The 'User Selection' panel on the right shows a grid of user records with columns for First Name, Last Name, and Last Logon Date.

First Name	Last Name	Last Logon Date
SDA	Allroles	2021-08-08 13:00:55
SDA	Allroles	2020-10-15 08:08:16
SDA	AllrolesEmail	2019-02-13 08:55:53
SDA	Autocomplaint Specialist	2019-02-14 09:34:42
Ram	Bala	
SDA	Complaint Specialist	2021-04-27 12:42:28
SDA	Complaint Specialist	

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-to, 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.



Work Instruction Create User

Image: Manage Users Screen

The screenshot shows the 'Manage Users' screen in the WBSCM application. At the top, there are navigation tabs: Home, Operations, Admin (which is selected), Reports, and Help. Below the tabs, a breadcrumb trail shows: Admin > Manage Users > Manage Users. On the left, there's an 'Organization Selection' panel with a search bar and buttons for Active Organizations and Inactive Organizations. A dropdown menu is open under 'Active Organizations' showing one item: 'TX Dept. of Agriculture - EDI'. To the right, there's a 'User Selection' panel with its own search bar and a table of users. The table has columns for First Name, Last Name, and Last Logon Date. It lists several entries, all associated with 'SDA' and 'Allroles'. A 'Create New User' button is at the bottom of this panel.

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

Field	R/O/C	Description
Organization Search Criteria	R	<p>Field on a WBSCM screen used to define the criteria for a search.</p> <p>Example: *central*</p> <p>(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.</p>

Image: Manage Users Screen

The screenshot shows the 'Manage Users' screen with the 'Admin' tab selected. The 'Organization Selection' panel on the left displays a search bar with 'central*' and a list of organizations under 'Active Organizations'. One organization, 'TX Dept. of Agriculture – EDI', is highlighted. The 'User Selection' panel on the right shows a table of users with columns for First Name, Last Name, and Last Logon Date. A 'Create New User' button is at the bottom.

First Name	Last Name	Last Logon Date
SDA	Allroles	2021-06-8 13:00:55
SDA	Allroles	2020-10-15 08:08:16
SDA	AllrolesEmail	2019-02-13 08:55:53
SDA	Autocomplaint Specialist	2019-02-14 09:34:42
Ram	Bala	
SDA	Complaint Specialist	2021-04-27 12:42:28
SDA	Complaint Specialist	

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

Image: Manage Users Screen

The screenshot shows the 'Manage Users' screen with the 'Admin' tab selected. The 'Organization Selection' panel on the left displays a search bar with 'central*' and a list of organizations under 'Active Organizations'. One organization, '(Recipient Agency) Central Texas Food Bank, Austin, TX (0004001181)', is highlighted. The 'User Selection' panel on the right shows a table of users with columns for First Name, Last Name, and Last Logon Date. A 'Create New User' button is at the bottom.

First Name	Last Name	Last Logon Date
SDA	Allroles	2021-06-8 13:00:55
SDA	Allroles	2020-10-15 08:08:16
SDA	AllrolesEmail	2019-02-13 08:55:53
SDA	Autocomplaint Specialist	2019-02-14 09:34:42
Ram	Bala	
SDA	Complaint Specialist	2021-04-27 12:42:28
SDA	Complaint Specialist	

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

Admin needs to search for an existing user by last name

Then

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

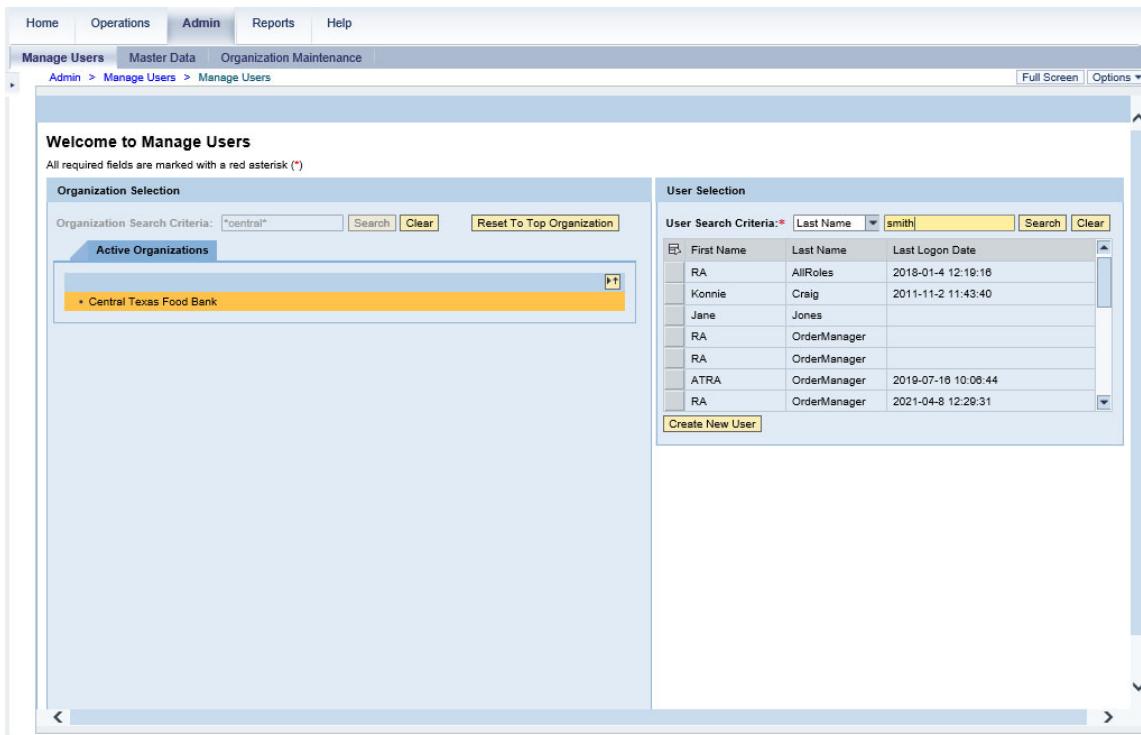
The screenshot shows the WBSCM Admin interface with the 'Manage Users' tab selected. The 'User Selection' panel is open, displaying a table of users with columns for First Name, Last Name, and Last Logon Date. A search bar at the top of the panel allows filtering by Last Name. Below the table is a 'Create New User' button. On the left, the 'Organization Selection' panel shows the 'Active Organizations' tab selected, with 'Central Texas Food Bank' listed. The main content area displays a welcome message and organization search criteria.

First Name	Last Name	Last Logon Date
RA	AllRoles	2018-01-4 12:19:16
Konnie	Craig	2011-11-2 11:43:40
Jane	Jones	
RA	OrderManager	
RA	OrderManager	
ATRA	OrderManager	2019-07-18 10:08:44
RA	OrderManager	2021-04-8 12:29:31

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

Field	R/O/C	Description
User Search Criteria: (Value)	R	<p>First name or last name of the user to locate.</p> <p>Example: smith</p>  <p>(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.</p>

Image: Manage Users Screen

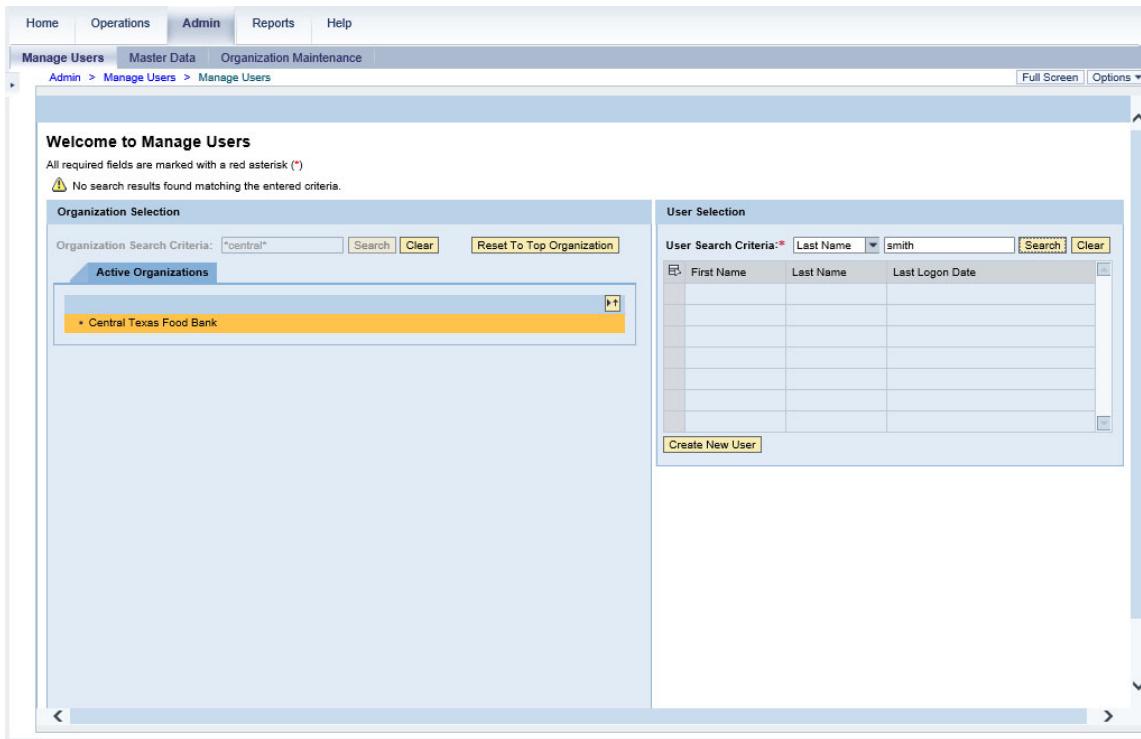


The screenshot shows the WBSCM Admin interface for managing users. The top navigation bar includes Home, Operations, Admin (selected), Reports, and Help. Below the navigation is a breadcrumb trail: Admin > Manage Users > Manage Users. The main content area has two sections: 'Organization Selection' and 'User Selection'. In 'Organization Selection', the 'Active Organizations' tab is selected, showing a list with 'Central Texas Food Bank' highlighted. In 'User Selection', a search bar shows 'User Search Criteria: Last Name smith' with a search result table below it. The table lists users with first names RA, Konnie, Jane, RA, RA, and ATRA, and last names AllRoles, Craig, Jones, OrderManager, OrderManager, and OrderManager respectively, along with their last logon dates.

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

The screenshot shows the 'Manage Users' screen in the WBSCM application. The top navigation bar includes links for Home, Operations, Admin, Reports, and Help. The 'Admin' link is highlighted. Below the navigation is a breadcrumb trail: Admin > Manage Users > Manage Users. On the left, the 'Organization Selection' panel displays a search field with 'central*' entered, a 'Search' button, a 'Clear' button, and a 'Reset To Top Organization' button. A list titled 'Active Organizations' shows one item: '+ Central Texas Food Bank'. On the right, the 'User Selection' panel has a search field with 'smith' entered, a 'Search' button, and a 'Clear' button. It also includes columns for First Name, Last Name, and Last Logon Date, with a 'Create New User' button at the bottom.

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

The screenshot shows the 'Manage Users' screen with the following interface elements:

- Top Navigation:** Home, Operations, Admin (selected), Reports, Help.
- Breadcrumb:** Admin > Manage Users > Manage Users.
- Search Bar:** User Search Criteria: Last Name (smith), Search, Clear.
- User Selection Table:** Columns: First Name, Last Name, Last Logon Date.
- Create New User:** Button.
- User Details Tab:** Personal Data, Role Data, Admin Data.
- Personal Data Fields:**
 - Company: 0004001181
 - User ID: (empty)
 - Title: (dropdown menu)
 - First Name:*
 - Last Name:*
 - Email:*
 - Fax:
 - Mobile Phone:
 - Phone:

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

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

Field	R/O/C	Description
Last Name:	R	<p>Last name of the user.</p> <p>Example: Smith</p>
Email:	C	<p>Email address for the user or organization.</p> <p>Example: jane.smith@email.com</p> <p> (Note) This is the email address where the new registration email will be sent. The new user must have access to this email account.</p>
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	<p>A free text field in which to enter the street address of the user or organization.</p> <p>Example: 280 W Highway 30</p>
City:	R	<p>City where the user or company is located.</p> <p>Example: Austin</p>
Zip code:	R	<p>Zip code for the location of the user or organization.</p> <p>Example: 78701</p> <p> (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</p>

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



Work Instruction Create User

Image: Manage Users Screen

The screenshot shows the 'Manage Users' screen with the 'User Selection' tab active. On the left, under 'Organization Selection', there is a search bar with 'central' entered, and a list of organizations with 'Central Texas Food Bank' selected. On the right, under 'User Selection', there is a search bar with 'smith' entered, and a table showing user details like First Name, Last Name, and Last Logon Date. At the bottom, there is a 'Create New User' button. The 'User Details' tab is also visible at the bottom.

13. Click **Role Data** (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

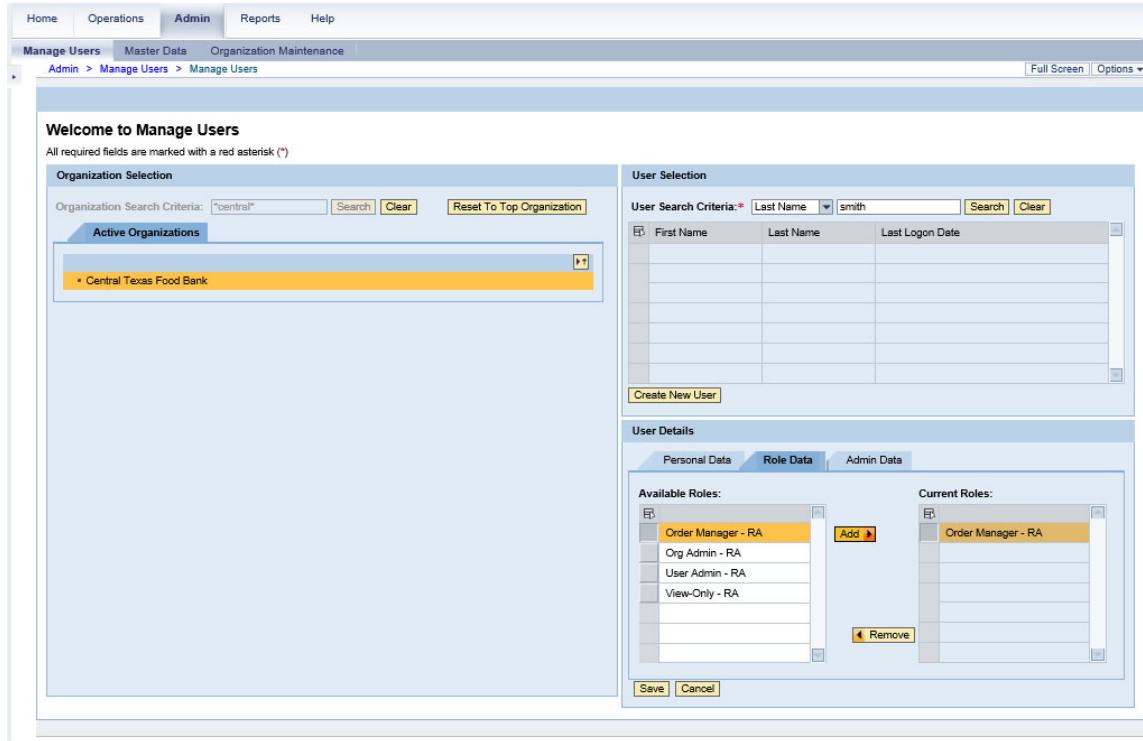
The screenshot shows the 'Manage Users' screen with the 'User Selection' tab active. In the 'Available Roles' list, the 'Order Manager - RA' role is selected and highlighted in yellow. The 'Current Roles' list shows 'No Current Roles Assigned'. Other roles listed include Org Admin - RA, User Admin - RA, and View-Only - RA.

- 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

The screenshot shows the 'Manage Users' screen with the 'User Selection' tab active. In the 'Available Roles' list, the 'Order Manager - RA' role is selected and highlighted in yellow. The 'Current Roles' list shows 'No Current Roles Assigned'. Other roles listed include Org Admin - RA, User Admin - RA, and View-Only - RA.

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

The screenshot shows the WBSCM Manage Users interface. At the top, there's a navigation bar with Home, Operations, Admin (which is selected), Reports, and Help. Below that is a secondary navigation bar with Manage Users, Master Data, and Organization Maintenance. The main content area has a title "Welcome to Manage Users" and a note that all required fields are marked with a red asterisk (*). On the left, there's an "Organization Selection" section with a search bar for "Organization Search Criteria: *central*", a "Search" button, a "Clear" button, and a "Reset To Top Organization" link. A list of "Active Organizations" shows one entry: "Central Texas Food Bank". On the right, there are two main sections: "User Selection" and "User Details". The "User Selection" section includes a search bar for "User Search Criteria: * Last Name: smith", a "Search" button, and a "Clear" button. It also has a table for "User Selection" with columns for First Name, Last Name, and Last Logon Date. Below this is a "Create New User" button. The "User Details" section has tabs for Personal Data, Role Data (which is selected), and Admin Data. Under "Role Data", there are two lists: "Available Roles" (containing Order Manager - RA, Org Admin - RA, User Admin - RA, View-Only - RA) and "Current Roles" (containing Order Manager - RA). Between these lists is an "Add" button with a right-pointing arrow. Below the lists are "Save" and "Cancel" buttons.

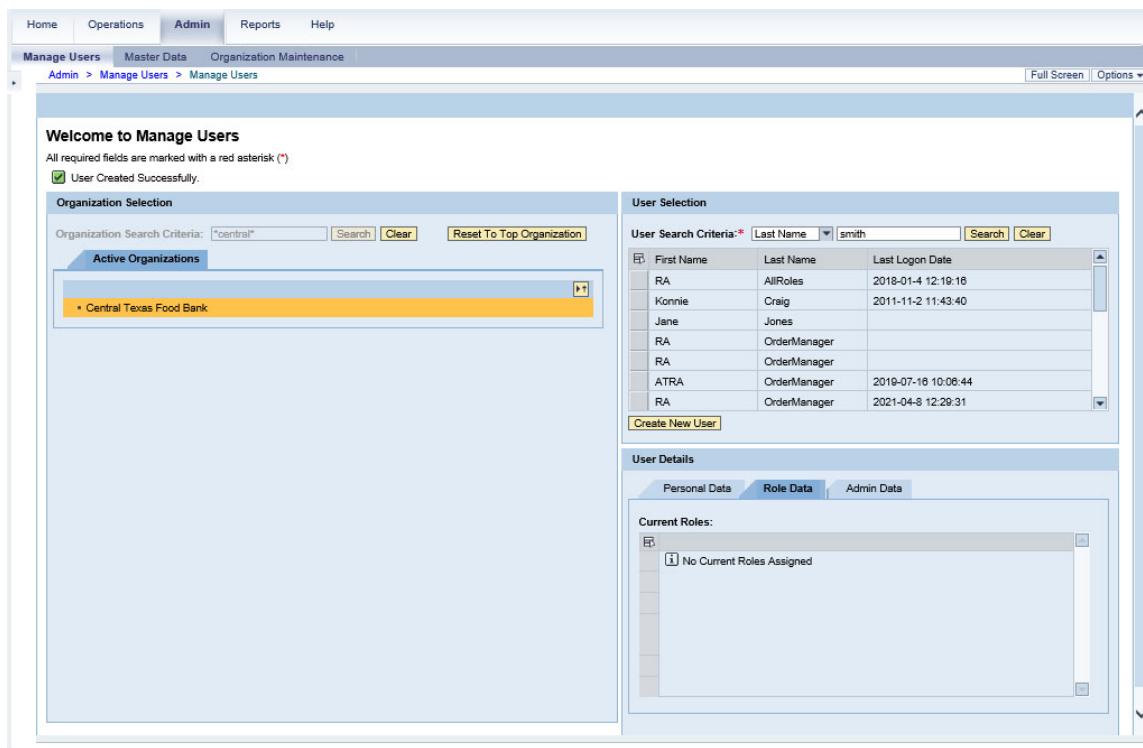
17. Click **Save** (the **Save** button) to save the new user.



(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

The screenshot shows the WBSCM 'Manage Users' interface. At the top, there's a navigation bar with Home, Operations, Admin (which is selected), Reports, and Help. Below that is a secondary navigation bar with Manage Users, Master Data, and Organization Maintenance. The main content area has a 'Welcome to Manage Users' message and a note about successful user creation. It includes sections for 'Organization Selection' (with a search bar for 'central') and 'User Selection' (a grid showing users with columns for First Name, Last Name, and Last Logon Date). A 'Create New User' button is visible. On the left, there's a sidebar for 'Active Organizations' with one item listed: 'Central Texas Food Bank'. The 'User Details' section on the right has tabs for Personal Data, Role Data (selected), and Admin Data. Under 'Role Data', it says 'Current Roles:' and notes 'No Current Roles Assigned'.

- 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

- Start the transaction using the following Portal path: **Admin tab → Manage Users tab → Manage Users link.**

Image: Manage Users Screen

The screenshot shows the WBSCM application interface. The top navigation bar includes Home, Operations, Admin (which is selected), Reports, and Help. Below the navigation bar is a secondary menu with Admin, Master Data, and Organization Maintenance tabs. The Admin tab is further expanded to show sub-options: Maintain User Profile, Manage Users (which is selected and highlighted in blue), and User Security Report. The main content area has a breadcrumb trail: Admin > Manage Users > Manage Users. It features a 'Welcome to Manage Users' message and a note that all required fields are marked with a red asterisk (*). There are two main panels: 'Organization Selection' on the left and 'User Selection' on the right. The Organization Selection panel contains an 'Organization Search Criteria' field, search buttons (Search, Clear, Reset To Top Organization), and tabs for 'Active Organizations' and 'Inactive Organizations'. The Active Organizations tab is selected, showing a list with one item: 'TX Dept. of Agriculture – EDI'. The User Selection panel contains a 'User Search Criteria' field set to 'Last Name', a table of user details, and a 'Create New User' button. The table columns include First Name, Last Name, and a truncated column. The users listed are SDA (with roles Allroles, Allroles, AllrolesEmail) and Ram (with roles Autocomplaint Specialist, Complaint Specialist, Complaint Specialist).

- 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.

- 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

The screenshot shows the WBSCM 'Manage Users' interface. At the top, there's a navigation bar with 'Home', 'Operations', 'Admin' (which is selected), 'Reports', and 'Help'. Below that is a secondary navigation bar with 'Manage Users' (selected), 'Master Data', and 'Organization Maintenance'. A breadcrumb trail shows 'Admin > Manage Users > Manage Users'. On the right, there are 'Full Screen' and 'Options' buttons.

The main area has two main sections:

- Organization Selection:** This section includes an 'Organization Search Criteria' field, 'Search', 'Clear', and 'Reset To Top Organization' buttons. It also has tabs for 'Active Organizations' and 'Inactive Organizations'. An arrow icon points to the 'Available Organizations' dropdown next to the tree item 'TX Dept. of Agriculture – EDI'.
- User Selection:** This section includes a 'User Search Criteria' field, 'Last Name' dropdown, 'Search', and 'Clear' buttons. It displays a grid of user data with columns for First Name, Last Name, and Last Logon Date. The data includes entries for SDA users like Allroles, AllrolesEmail, Autocomplaint Specialist, Bala, Complaint Specialist, and Complaint Specialist, along with Ram. A 'Create New User' button is at the bottom.

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 from 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.

Image: Manage Users Screen

The screenshot shows the WBSCM Admin interface for managing users. The top navigation bar includes Home, Operations, Admin, Reports, and Help. The Admin menu is selected. Below the navigation is a breadcrumb trail: Admin > Manage Users > Manage Users. The main area is titled "Welcome to Manage Users". It features two main sections: "Organization Selection" and "User Selection".

Organization Selection: This section contains an "Organization Search Criteria" input field, a "Search" button, a "Clear" button, and a "Reset To Top Organization" link. It also includes tabs for "Active Organizations" and "Inactive Organizations". The "Active Organizations" tab is selected, showing a list of organizations. One item, "TX Dept. of Agriculture – EDI", is expanded, revealing a detailed list of sub-organizations and their details.

User Selection: This section contains an "User Search Criteria" input field, a "Last Name" dropdown, a "Search" button, and a "Clear" button. It includes a table listing user information such as First Name, Last Name, and Last Logon Date. A "Create New User" button is located at the bottom of this pane.

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

Field	R/O/C	Description
Organization Search Criteria	R	<p>Field on a WBSCM screen used to define the criteria for a search.</p> <p>Example: *central*</p> <p>(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.</p>

Image: Manage Users Screen

The screenshot shows the 'Manage Users' screen with the 'Admin' tab selected. The 'Organization Selection' pane on the left displays a search bar with 'central*' and a list of organizations under 'Active Organizations'. One organization, 'TX Dept. of Agriculture – EDI', is expanded, showing its sub-organizations. The 'User Selection' pane on the right shows a table of users with columns for First Name, Last Name, and Last Logon Date. A 'Create New User' button is at the bottom.

First Name	Last Name	Last Logon Date
SDA	Allroles	2021-08-9 16:31:03
SDA	Allroles	2020-10-15 08:08:16
SDA	AllrolesEmail	2019-02-13 08:55:53
SDA	Autocomplaint Specialist	2019-02-14 09:34:42
Ram	Bala	
SDA	Complaint Specialist	2021-04-27 12:42:28
SDA	Complaint Specialist	

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

Image: Manage Users Screen

This screenshot is similar to the previous one but shows the result of a search. The 'Organization Selection' pane now lists only one organization, '(Recipient Agency) Central Texas Food Bank, Austin, TX (0004001181)', which is highlighted with a yellow box. The rest of the interface is identical to the first screenshot.

-
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

The screenshot shows the 'Manage Users' screen with the 'Admin' tab selected. The 'Organization Selection' panel on the left displays a search bar with 'central*' and a list of organizations, with 'Central Texas Food Bank' highlighted. The 'User Selection' panel on the right shows a table of users with columns for First Name, Last Name, and Last Logon Date. A 'Create New User' button is at the bottom.

First Name	Last Name	Last Logon Date
RA	AllRoles	2018-01-4 12:19:16
Konnie	Craig	2011-11-2 11:43:40
Jane	Jones	
RA	OrderManager	
RA	OrderManager	
ATRA	OrderManager	2019-07-18 10:08:44
RA	OrderManager	2021-04-8 12:29:31

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

The screenshot shows the WBSCM Work Instruction interface for managing users. At the top, there's a navigation bar with tabs for Home, Operations, Admin, Reports, and Help. The Admin tab is selected. Below the navigation is a secondary menu with 'Manage Users' as the active item, followed by Master Data and Organization Maintenance. A breadcrumb trail shows 'Admin > Manage Users > Manage Users'. On the left, a 'Welcome to Manage Users' message indicates that all required fields are marked with a red asterisk (*). The 'Organization Selection' section contains a search bar for 'Organization Search Criteria' with the value 'central*', and buttons for 'Search', 'Clear', and 'Reset To Top Organization'. Below this is a list titled 'Active Organizations' with one entry: 'Central Texas Food Bank'. On the right, a 'User Selection' panel displays a table of users. The table has columns for First Name, Last Name, and Last Logon Date. The 'Last Name' column is currently selected. The data in the table is as follows:

First Name	Last Name	Last Logon Date
RA	AllRoles	2018-01-4 12:19:16
Konnie	Craig	2011-11-2 11:43:40
Jane	Jones	
RA	OrderManager	
RA	OrderManager	
ATRA	OrderManager	2019-07-16 10:06:44
RA	OrderManager	2021-04-8 12:29:31

At the bottom of the user selection panel is a 'Create New User' button.

- 10.** Perform one of the following:

If

Admin needs to search for an existing user by last name

Then

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

First Name	Last Name	Last Logon Date
RA	AllRoles	2018-01-4 12:19:16
Konnie	Craig	2011-11-2 11:43:40
Jane	Jones	
RA	OrderManager	
RA	OrderManager	
ATRA	OrderManager	2019-07-16 10:08:44
RA	OrderManager	2021-04-8 12:29:31

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

Field	R/O/C	Description
User Search Criteria: (value)	R	<p>First name or last name of the user to locate.</p> <p>Example: smith</p> <p> (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.</p>

Image: Manage Users Screen

The screenshot shows the WBSCM Manage Users interface. At the top, there's a navigation bar with Home, Operations, Admin, Reports, and Help. Below it is a secondary navigation bar with Manage Users, Master Data, and Organization Maintenance. The main content area has two sections: 'Organization Selection' on the left and 'User Selection' on the right.

Organization Selection: Contains a search bar for 'Organization Search Criteria' with the value '*central*', and buttons for Search, Clear, and Reset To Top Organization. A list of 'Active Organizations' shows one item: 'Central Texas Food Bank'.

User Selection: Contains a search bar for 'User Search Criteria' with the value 'smith', and buttons for Search, Clear, and Create New User. A table lists users with columns: First Name, Last Name, and Last Logon Date. The results show several entries, including RA, AllRoles, 2018-01-4 12:19:16; Konnie, Craig, 2011-11-2 11:43:40; Jane, Jones, etc.

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

Manage Users Screen

This screenshot is identical to the one above, but it includes a search term 'smith' in the 'User Search Criteria' field of the 'User Selection' section. The user list on the right now shows only one result: Jane, Smith, with a last logon date of null.

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

The screenshot shows the WBSCM software interface for managing users. The top navigation bar includes Home, Operations, Admin (selected), Reports, and Help. Below the navigation is a breadcrumb trail: Admin > Manage Users > Manage Users. The main content area has a title 'Welcome to Manage Users' and a note that all required fields are marked with a red asterisk (*). On the left, the 'Organization Selection' panel shows a search for 'central' and a list of active organizations, with 'Central Texas Food Bank' selected. On the right, the 'User Selection' panel shows a search for 'smith' and a table with one result: Jane Smith. The 'User Details' panel is open, showing tabs for Personal Data, Role Data, and Admin Data. Under Personal Data, fields include Company (0004001181), Street Address (280 W Highway 30), City (Austin), Zip Code (78701), Country (USA), State Or Province (Texas), Time Zone (Central Time (Dallas)), and various contact details like Email (jane.smith@email.com) and Phone (555-555-1212). Buttons at the bottom of the details panel include 'Modify User' and 'Delete User'.

14. Perform one of the following:

If

Admin needs to review the user profile details without making changes

Then

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

The screenshot shows the 'Manage Users' screen. At the top, there are tabs for Home, Operations, Admin (which is selected), Reports, and Help. Below the tabs, a breadcrumb navigation shows Admin > Manage Users > Manage Users. The main area has a title 'Welcome to Manage Users' and a note that all required fields are marked with a red asterisk (*). It includes sections for 'Organization Selection' (with a search bar for 'central'), 'User Selection' (with a search bar for 'smith'), and 'User Details' (with tabs for Personal Data, Role Data, and Admin Data). In the User Details section, a user named 'Jane Smith' is selected. The details include company information (0004001181, Street Address: 280 W Hingway 30), user ID (SMITHJ0024), title (dropdown arrow), first name (Jane), last name (Smith), email (jane.smith@email.com), mobile phone (555-555-1212), and time zone (Central Time (Dallas)). Buttons at the bottom allow for Modify User, Delete User, Save, and Cancel.

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 i (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 i (Note) Use (the Drop-down arrow) in the field to select the country.

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



(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

The screenshot shows the WBSCM Manage Users interface. At the top, there are tabs for Home, Operations, Admin (which is selected), Reports, and Help. Below the tabs, a breadcrumb navigation shows Admin > Manage Users > Manage Users. On the left, a sidebar has links for Manage Users, Master Data, and Organization Maintenance. The main content area has a title 'Welcome to Manage Users' and a note that all required fields are marked with a red asterisk (*). It includes sections for 'Organization Selection' (with a search bar for 'Organization Search Criteria: *central*') and 'User Selection' (with a search bar for 'User Search Criteria: * smith*'). The 'User Details' tab is selected, showing 'Available Roles:' and 'Current Roles:' lists. The 'Available Roles:' list includes Order Manager - RA, Org Admin - RA, User Admin - RA, and View-Only - RA. The 'Current Roles:' list contains one item: Order Manager - RA. Buttons at the bottom include Modify User, Delete User, Save, and Cancel.

17. Perform the following as needed:

If	Then
Admin needs to assign a role to the selected user	<ol style="list-style-type: none"> Click (the Selection button) next to the role in the <i>Available Roles</i> column. Click (the Add button) to assign the role to the user. <p> (Note) Once assigned, the role will appear in the <i>Current Roles</i> column.</p>
Admin needs to unassign a role from the selected user	<ol style="list-style-type: none"> Click (the Selection button) next to the role in the <i>Current Roles</i> column. Click (the Remove button) to unassign the role from the user. <p> Once unassigned, the role will appear in the <i>Available Roles</i> column.</p>
Admin has completed updates to <i>Role Data</i>	Go to Step 20.



(Note) If not already in modify mode, click (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

The screenshot displays the WBSCM Manage Users interface. At the top, there's a navigation bar with links for Home, Operations, Admin (which is selected), Reports, and Help. Below the navigation is a breadcrumb trail: Admin > Manage Users > Manage Users. The main area is titled "Welcome to Manage Users". It includes a note about required fields and a success message: "User Updated Successfully".

The "Organization Selection" panel shows a search field for "Organization Search Criteria" with the value "*central*", a "Search" button, and a "Reset To Top Organization" button. A list of active organizations is shown, with "Central Texas Food Bank" selected.

The "User Selection" panel contains a search field for "User Search Criteria" with the value "smith", a "Search" button, and a "Clear" button. A table lists users with columns for First Name, Last Name, and Last Logon Date. The row for "Jane Smith" is selected.

The "User Details" panel has tabs for Personal Data, Role Data (which is selected), and Admin Data. Under "Role Data", the "Current Roles" section shows a list of assigned roles: "Order Manager - RA" and "Org Admin - RA". The "Org Admin - RA" role is highlighted with a yellow background. At the bottom of the "Role Data" tab, there are buttons for "Modify User", "Delete User", "Save", and "Cancel".

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

The screenshot shows the WBSCM Admin interface for managing users. At the top, there's a navigation bar with Home, Operations, Admin (which is selected), Reports, and Help. Below that is a secondary navigation bar with Manage Users, Master Data, and Organization Maintenance. The main content area has a title 'Welcome to Manage Users' and a note that all required fields are marked with a red asterisk (*). The 'Organization Selection' section contains an 'Organization Search Criteria' input field with 'central*' and buttons for Search, Clear, and Reset To Top Organization. The 'Active Organizations' list shows 'Central Texas Food Bank'. The 'User Selection' section has a 'User Search Criteria' input field with 'Last Name: smith' and buttons for Search and Clear. A table lists users with columns for First Name, Last Name, and Last Logon Date. One row for 'Jane Smith' is highlighted with a yellow background. Below the table is a 'Create New User' button. The 'User Details' section has tabs for Personal Data, Role Data, and Admin Data (which is selected). Under Admin Data, there are fields for 'User Locked' (with an empty checkbox) and 'Reason Locked' (an empty text input), and a 'Resend New User Email' button. At the bottom are buttons for Modify User, Delete User, Save, and Cancel.

21. Perform any of the following:

If	Then
Admin needs to lock the user	<ol style="list-style-type: none"> Click Modify User (the Modify User button) to activate modify mode. Click <input type="checkbox"/> (the empty checkbox) next to User Locked to lock the user profile, preventing the user from accessing WBSCM. As applicable, provide information in the

If

Then

Admin needs to unlock the user

- Reason Locked:** field.
- Click **Save** (the **Save** button) to save the changes.

- Click **Modify User** (the **Modify User** button) to activate modify mode.
- Click (the checked box) next to **User Locked**: to unlock the user profile, allowing the user to access WBSCM.
- As applicable, provide information in the **Reason Locked:** field.
- 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

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

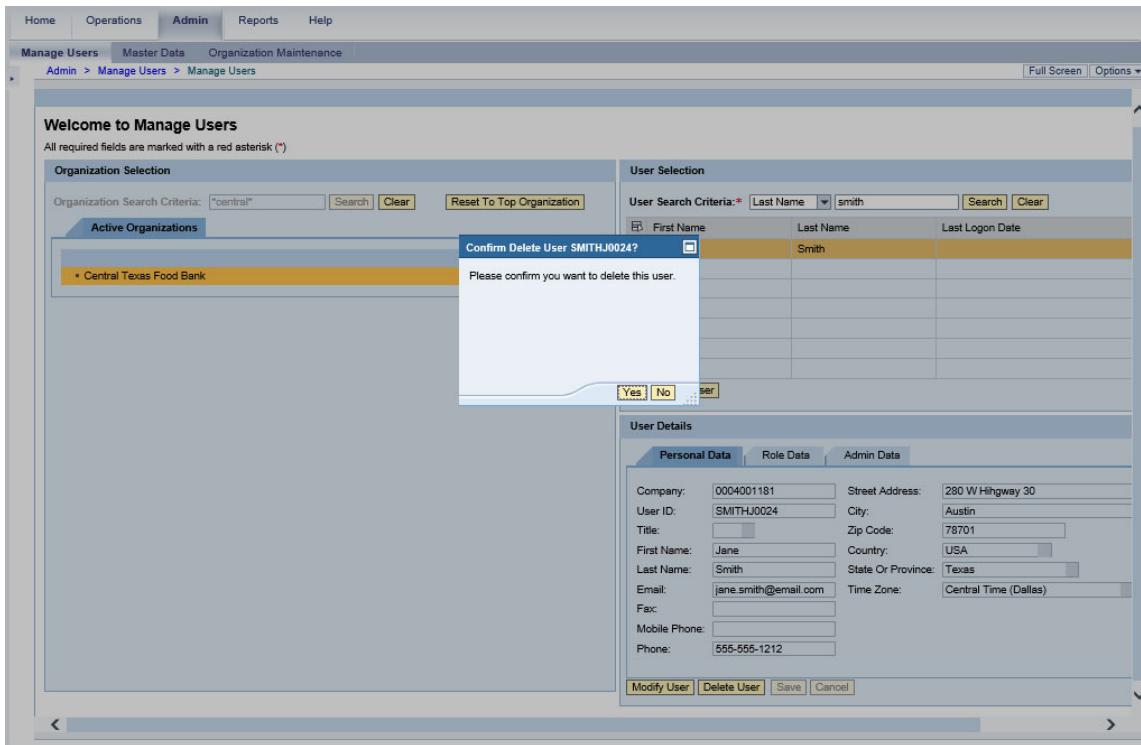


(Note) **Delete User** (the **Delete User** button) is active only in display mode. If the user is in modify mode the button is grayed out and cannot be used.



Work Instruction Display and Maintain User

Image: Confirm Delete User SMITHJ0024? Pop-Up



23. Click (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



Job Aid
User Security Report

Title	User Security Report						
Purpose	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.						
Portal Navigation Path	Admin tab ➔ Manage Users tab ➔ User Security Report						
	Organization Administrators (Org Admins) and User Administrators (User Admins)						
	This report is used for various purposes, including:						
	<table border="1"><thead><tr><th>USDA Users</th><th>Customer and Vendor Administrators</th></tr></thead><tbody><tr><td><ul style="list-style-type: none">• 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><ul style="list-style-type: none">• 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></tbody></table>			USDA Users	Customer and Vendor Administrators	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• 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
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	Note: To include users from sub-organizations, a User Admin must also have the Org Admin role.						



Job Aid User Security Report

Welcome to the User Security Report

To search for users, please enter a value in the Organization ID field, or select an Organization from the left-hand table below.

All required fields are marked with a red asterisk (*). Dates are formatted as MM/DD/YYYY.

Organization Name:

Select Organization

- * FNS - Head Quarters
- (Dom Ship-to) 15TH AVENUE FOOD CORP
- (Dom Ship-to) 20TH CENTURY
- (Dom Ship-to) 21ST CENTURY FOODS LTD
- (Dom Ship-to) 21ST CENTURY FOODS LTD
- (Dom Ship-to) 21ST CENTURY FOODS LTD
- (Dom Ship-to) 32 COLD
- (Dom Ship-to) 412U
- (Dom Ship-to) 412U INACTIVE
- (Dom Ship-to) A & C COLD STORAGE INC
- (Dom Ship-to) A & V PASTA PRODUCTS
- (Dom Ship-to) A C WAGNER YOUTH CORRECTIONAL FACILITY
- (Dom Ship-to) A S E T MICHIGAN NATURAL STORAGE
- (Dom Ship-to) A&J FOODS INC
- (Dom Ship-to) A2H FOOD BANK OF EAST CENTRAL INDIANA
- (Dom Ship-to) A2H FOOD BANK OF EAST CENTRAL INDIANA
- (Dom Ship-to) A2H OF NORTHWEST INDIANA
- (Dom Ship-to) AA WAREHOUSE & COLD STG CO
- (Dom Ship-to) AAFAF INC INACTIVE PER PROCESSOR
- (Dom Ship-to) AAFFES
- (Dom Ship-to) AAFFES ATLANTIC TRANSPORTATION

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

Search Filters

- Last Activity Date:
- Organization ID: *
- Organization Name:
- Sub Organization Type:
- EF: Org ID Org Name
- Role Assigned:
- ROB Acceptance Date From:
- ROB Version Accepted:
- Role Assigned:

WBSCM ID | User Name | Email ID | Phone | Mobile | Roles Assigned | Last Activity Dt | ROB Version Accepted | ROB Accept Dt | Recall C

① Enter an Organization ID and select the Search for Users button to start your search!

Download Excel | Print to PDF

(the **Search for Users** button).

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.



Job Aid
User Security Report

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.



Job Aid User Security Report

Search Filters

Last Activity Date	From:	<input type="text"/>	To Date:	<input type="text"/>																				
Organization ID:*	<input type="text"/> 0004000300																							
Organization Name:	FNS - Head Quarters																							
Sub Organization Type:	<input type="button" value="▼"/>																							
Select Sub Organization(s):	<table border="1"><tr><td>ZSDA</td><td>ID</td><td>Org Name</td><td><input type="button" value="◀"/></td></tr><tr><td>ZNW</td><td></td><td></td><td></td></tr><tr><td>ZHQ</td><td></td><td></td><td></td></tr><tr><td>ZDSH</td><td></td><td></td><td></td></tr><tr><td>ZSEM</td><td></td><td></td><td></td></tr></table>				ZSDA	ID	Org Name	<input type="button" value="◀"/>	ZNW				ZHQ				ZDSH				ZSEM			
ZSDA	ID	Org Name	<input type="button" value="◀"/>																					
ZNW																								
ZHQ																								
ZDSH																								
ZSEM																								
ROB Acceptance Date From:	<input type="text"/>	To Date:	<input type="text"/>																					
ROB Version Accepted:	<input type="text"/>																							
Role Assigned:	<input type="text"/>																							
<input type="button" value="Search For Users"/>																								

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.



Job Aid User Security Report

Home Operations Finance Admin Reports Help

Manage Users Master Data Full Screen Options ▾

Admin > Manage Users > User Security Report

Welcome to the User Security Report

To search for users please enter a value in the Organization ID field, or select an Organization from the left-hand table below.

All required fields are marked with a red asterisk (*).
Dates are formatted as MM/DD/YYYY

Search Filters

Last Activity Date From: To Date:
Organization ID: 0004000000
Organization Name: FNS - Head Quarters
Sub Organization Type:
Select Sub Organization(s): Org ID Org Name

ROB Acceptance Date From: To Date:
ROB Version Accepted:
Role Assigned:

WBSCM ID User Name Email ID Phone Mobile Roles Assigned Last Activity Dt ROB Version Accepted ROB Accept Dt Recall Contact? User Locked? User Deleted? Org ID Org Name Org Inactive?

Enter an Organization ID and select the Search for Users button to start your 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.



Job Aid User Security Report

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	703-305-2878		Order Manager - FNS View Only - FNS	2012-12-28 08:48:55	1.0
LIVINGSM0001	Margie Livingston	margie.livingston@fns.usda.gov	703-305-2879	202-297-0811	Order Manager WSD - FNS View Only - FNS	2017-03-1 18:10:08	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		

Report Output

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 10:28:48	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0004000300	FNS - Head Quarters	<input type="checkbox"/>	FNS	3101 PARK CENTER DRIVE 993, ALEXANDRIA, VA 22302-1500
2010-12-14 16:05:11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0004000300	FNS - Head Quarters	<input type="checkbox"/>	FNS	3101 PARK CENTER DRIVE 993, ALEXANDRIA, VA 22302-1500



Job Aid User Security Report

Fields		Definitions
WBSM ID		Unique WBSM ID for each user.
User Name		First and Last name of the user listed in WBSM.
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 WBSM.
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 WBSM.
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 WBSM.
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 WBSM.
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

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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-Shipment 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.

Catalog Maintenance

- Display RA Catalog
- Maintain Direct-Shipment Delivery Periods

File Uploads/Downloads

- Download Catalog
- Download Purchase Orders
- Download Sales Orders
- Upload SDA Sales Orders

NW Delivery Calendar

- Maintain National Warehouse Delivery Calendar
- NW Delivery Calendar Report

Order Management

- Consolidate Requisitions
- Domestic Order Entry
- Full Truck Load and Transfer Requests
- Redistribute Order Quantities
- Returned FNS Orders

Reports

- 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.

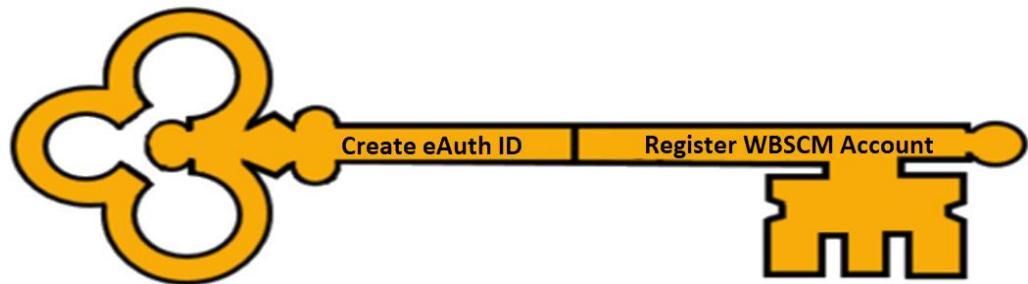
- Manage Users
- User Security Report

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**
- ❖ The registration link is only valid for 30 minutes; 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:

- ❖ Chrome is the recommended browser for the registration process.

- ❖ 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

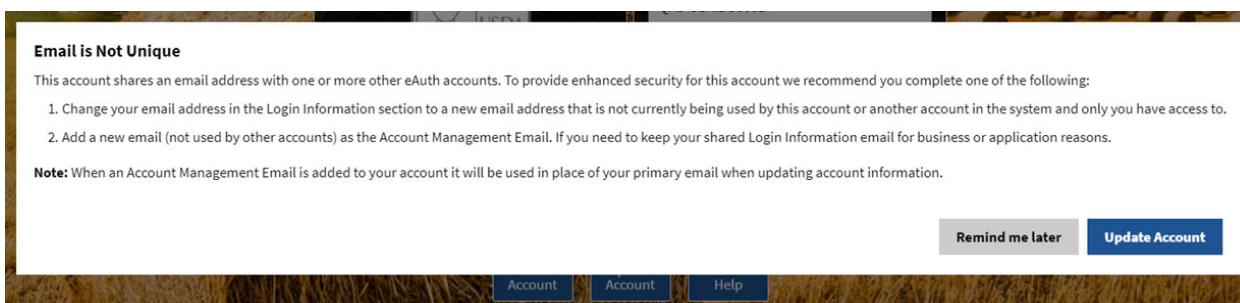
New eAuth IDs require a unique email address as the User ID. Existing eAuth IDs (created before June 26, 2020) remain unchanged, even if they were set up with non-unique email addresses.

This job aid includes information on the following topics:

- [About eAuthentication](#)
- [eAuth ID and WBSCM Accounts](#)
- [eAuth User ID and Password Recovery](#)
- [eAuth ID Maintenance](#)
- [Online Identity Verification Process](#)
- [eAuth Help Resources](#)
- [Related WBSCM Help Resources](#)

(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 exactly, 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

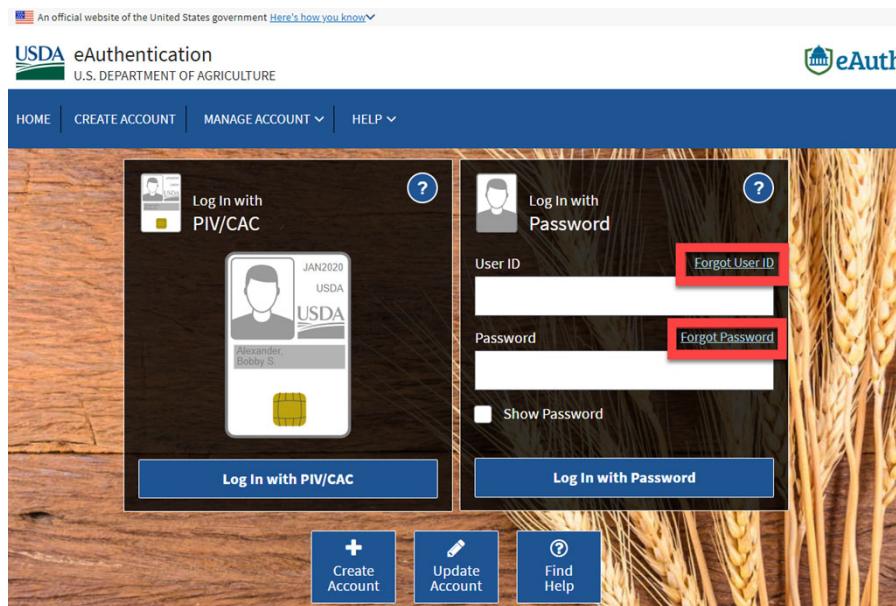
profile; if this is incorrect, the user should contact the user administrator for their organization to update the WBSCM profile before proceeding.

- 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.



HOME | CREATE ACCOUNT | MANAGE ACCOUNT | HELP

Forgot Password ?

I want to reset my password with my email
 I want to use my PIV/CAC Card (for federal employees and contractors)

Continue

- 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.

HOME | CREATE ACCOUNT | MANAGE ACCOUNT | HELP

Forgot Password

The email you provided is associated with multiple accounts. To identify a specific account and reset the password, please enter either your user ID or first and last name.

Please select a method to identify a specific account

User ID
 First and Last Name

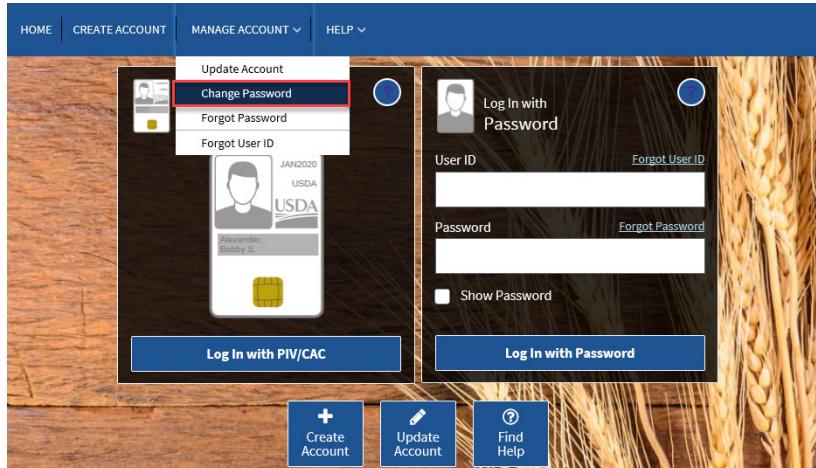
Submit

- 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

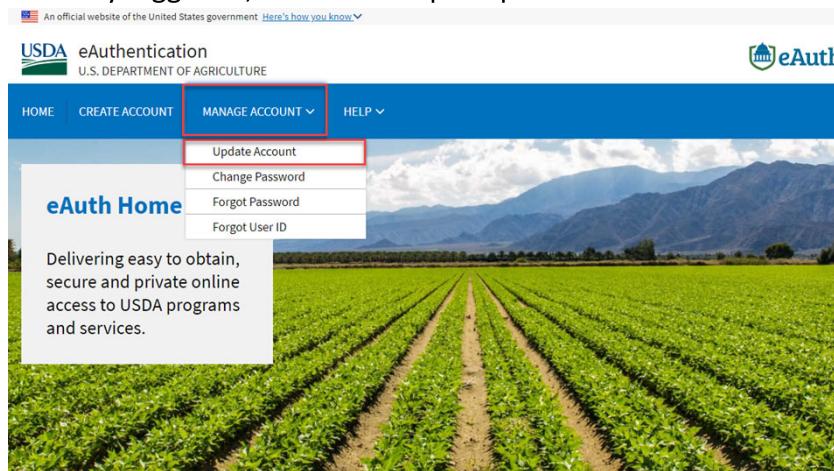
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(4) eAuth ID Maintenance

- 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:

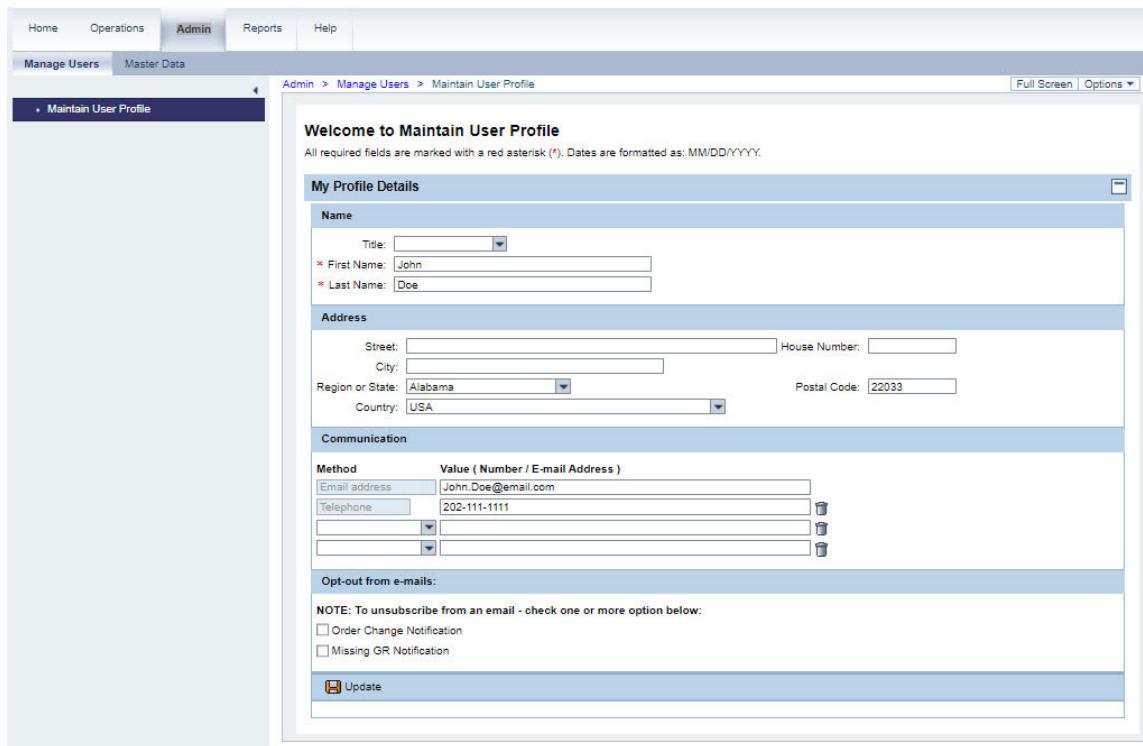
- Select **Admin** tab ➔ **Manage Users** folder ➔ **Maintain User Profile** link.

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

The screenshot shows the 'Welcome to Maintain User Profile' page. At the top, it says 'All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YYYY.' Below this is a section titled 'My Profile Details' with tabs for 'Name', 'Address', 'Communication', and 'Opt-out from e-mails'. The 'Name' tab is active, showing fields for Title, First Name (John), and Last Name (Doe). The 'Address' tab shows Street, House Number, City, Region or State (Alabama), Postal Code (22033), and Country (USA). The 'Communication' tab shows Email address (John.Doe@email.com) and Telephone (202-111-1111). The 'Opt-out from e-mails' tab contains a note about unsubscribing and two checkboxes: 'Order Change Notification' and 'Missing GR Notification'. At the bottom right is an 'Update' button.

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	<ol style="list-style-type: none"> Click <input type="button" value="Method"/> (the Method drop-down) to select the communication method. 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	<ol style="list-style-type: none"> Click in the Value (Number / E-mail Address) field for the existing communication method.

If	Then
The user needs to change or delete an existing Communication Method	2. Type the new value. 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 <i>Opt-out from emails:</i> section	 (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.



Work Instruction Maintain User Profile

Image: Maintain User Profile Screen

The screenshot shows the 'My Profile Details' section of the WBSCM Maintain User Profile screen. It includes fields for Name (Title: Mr., First Name: John, Last Name: Doe), Address (Street: 123 Main Street, City: Mobile, Region or State: Alabama, Postal Code: 12345, Country: USA), Communication (Email address: John.Doe@email.com, Telephone: 202-111-1111, Mobile Phone: 202-555-1414), and Opt-out from e-mails (checkboxes for Order Change Notification and Missing GR Notification). A blue 'Update' button is located at the bottom right of the form.

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



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



Work Instruction Maintain User Profile

Image: Maintain User Profile Screen

The screenshot shows the 'Maintain User Profile' screen. At the top, there's a navigation bar with links for Home, Operations, Admin, Reports, and Help. Below that is a secondary navigation bar with Manage Users and Master Data tabs, with Manage Users selected. A breadcrumb trail indicates the current location: Admin > Manage Users > Maintain User Profile. A success message 'Data was saved successfully' is displayed. The main content area is titled 'Welcome to Maintain User Profile' and includes a note about required fields and date formats. It contains three sections: 'My Profile Details', 'Address', and 'Communication'. In the 'My Profile Details' section, fields for Title (Mr.), First Name (John), and Last Name (Doe) are filled. The 'Address' section includes fields for Street (123 Main Street), House Number, City (Mobile), Region or State (Alabama), Postal Code (12345), and Country (USA). The 'Communication' section lists methods and values: Email address (Joh.Doe@email.com), Mobile Phone (202-555-1414), and Telephone (202-111-1111). There's also an 'Opt-out from e-mails:' section with a note and two checkboxes for Order Change Notification and Missing GR Notification.

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.