

# WBSCM RA User Roles

The following document provides a summary of the WBSCM User Roles, including functions each user role can perform.

## Role #1

### User Administrator RA

User Administrators can perform the following functions:

- Create new users
  - Cannot create another User Admin.
  - Only two User Admin. per organization.
- Update contact information and assigned roles for users within their RA organization
- Deactivate accounts that are no longer needed
- Run User Security Report

## Role #2

### Order Manager

Order Managers can perform the following functions:

- Run reports:
  - Entitlement/Bonus Summary Report
  - Entitlement/Bonus Detail Report
- Create Domestic Order Entries
- Enter or Upload Shipment Receipts (\*Direct Ship RAs only)

## Role #3

### Organization Administrator RA

Org. Administrators can perform the following functions:

- View users
- Manage organization information
- Run User Security Report

## Role #4

### View Only RA

View Only RA users can perform the following functions:

- Entitlement/Bonus Summary Report
- Entitlement/Bonus Detail Report
- Domestic Ship-To Contacts Report
- Requisition Status Report
- Redistribution/Redonation Report
- Value of Commodities Received Report



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# WBSCM RA User Roles Worksheet

Identify staff to assign to each WBSCM User Role. Enter these names in the WBSCM Account Access Information JotForm. Have email address, phone, and title ready.

**Role #1**

**User Administrator RA**

**User Administrators can:**

- Create new users
- Assigned roles to users
- Deactivate accounts no longer needed
- **Only one User Admin per organization**
- **Small Districts: UA can serve in all roles**

**DESIGNATED STAFF NAME**

1. \_\_\_\_\_

**Role #3**

**Organization Administrator RA**

**Org. Administrators can:**

- View users
- Manage organization information
- Run User Security Report
- Can designate up to six users to this role

**DESIGNATED STAFF NAME**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

**Role #2**

**Order Manager**

**Order Managers can:**

- Create Domestic Order Entries
- Entitlement/Bonus Summary Report
- Entitlement/Bonus Detail Report
- Can designate up to six users to this role

**DESIGNATED STAFF NAME**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

**Role #4**

**View Only RA**

**View Only RA users can view all reports**

- Can designate up to six staff to this role

**DESIGNATED STAFF NAME**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_



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# WBSCM User Administrator

The User Administrator creates and manages users for their organization and has access to the User Security Report. Functions and “views” available to User Administrators are found in the Admin tab.

## WBSCM Portal Views

The screenshot displays the WBSCM User Administrator interface. At the top, there are navigation tabs: Home (1), Admin (1), and Help. The Admin tab is selected. On the left, a sidebar menu contains: Maintain User Profile (2), Manage Users (3), and User Security Report (4). The main content area shows the 'Manage Users' page. It features a 'Welcome to Manage Users' header, a 'User Selection' section with search criteria (Last Name) and search buttons, and a table of users. The table has columns for First Name, Last Name, and Last Logon Date. Two users are listed: 'Lemon 1 User8' (RA, 2022-12-7 16:17:24) and 'Lemon 1 User6' (RA, 2022-05-6 19:51:02). Below the table are buttons for 'Create New User' (3), 'Modify User' (3), and 'Delete User' (3). The 'User Details' section is visible, with tabs for Personal Data, Role Data, and Admin Data. The Personal Data tab is active, showing fields for Company, User ID, First Name, Email, Street Address, City, Country, and Time Zone.

- 1 Available Functions:** User Administrators see the Home, Admin, and Help tabs in the top navigation.
- 2 Maintain User Profile:** update personal name, address, email address; subscribe to email notifications\*  
*\*Important notifications are sent via email. TDA recommends staying opted in.*
- 3 Manage Users:** create new users; modify all users' personal, role, and admin data; delete users.
- 4 User Security Report:** Access all user information.



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# WBSCM Order Manager

The Order Manager creates requisitions for materials. Direct Ship RAs can upload or enter receipts through the Order Management function. Entitlement/Bonus Detail and Entitlement Bonus Summary Reports can be accessed through the Reports tab.

## WBSCM Portal Views

The screenshot shows the WBSCM Order Manager portal. The top navigation bar includes Home, Operations (1), Admin, Reports, and Help. The left sidebar shows Order Management (2), Domestic Order Entry (3), and Shipment Receipts (4). The main content area displays 'My Transactions', 'Catalog', 'Entitlement', and 'Transaction in Process'. The 'Product Catalog' section is highlighted with a red box (3) and contains a search bar and a list of product categories such as Direct Delivery, Meat, Poultry, Vegetables, Fruits, Juice, Dairy, Pasta/Rice, Processing Diversion, Veg/Fruit/Juice, and Poultry. A 'Welcome' message and a 'Browse in the Product Catalog' link are also visible.

- 1 Available Functions:** Order Managers see the Home, Operations, Admin, Reports, and Help tabs in the top navigation.
- 2 Order Management:** Access Domestic Order Entry link through the Order Management folder.
- 3 Domestic Order Entry:** Access product catalog to place requisitions.
- 4 Shipment Receipts:** Direct Ship Recipient Agencies can upload or enter shipment receipts.



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# WBSCM Org. Administrator

The Organization Administrator manages organization contact details and data, views users, and has access to the User Security Report. Functions and “views” available to User Administrators are found in the Admin tab.

## WBSCM Portal Views

Home **1** Admin Help

Manage Users Organization Maintenance

**2**

• Maintain Organization **3**

Admin > Organization Maintenance > Maintain Organization

**3**

Update my Organization - Organization ID: 4007980

Back

Address Relationship Programs Miscellaneous Status

All required fields are marked with a red asterisk (\*).

**Name**

\* Name: Lemon 1 RA

Additional Name:

**Address**

\* Street Address 1: 5701 Springdale Road

Street Address 2:

Street Address 3:

\* City: AUSTIN

\* Country: USA

\* State: Texas

\* County: Austin

\* Postal Code: 78723

\* Zone: ESC13

Submit

- 1 Available Functions:** Organization Administrators see the Home, Admin, and Help tabs in the top navigation.
- 2 Maintain Users:** View personal name, address, email address and view other user information for the organization.
- 3 Maintain Organization:** Found under the Organization Maintenance tab, Org. Admins can update organization information including address, programs, etc.



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# WBSCM View Only-RA

The View Only-RA role has access to a variety of reports.

## WBSCM Portal Views

The screenshot shows the WBSCM Portal interface. At the top, there are navigation tabs: Home (1), Admin, Reports, and Help. Below the tabs is a breadcrumb trail: Reports > Order Processing > Entitlement Management > Entitlement/Bonus Summary Report. On the left, a sidebar menu lists several reports: Entitlement Management (2), Entitlement/Bonus Summary Report, RA Entitlement/Bonus Detail Report, Domestic Ship-To Contacts Report, Redistribution/Redonation Detail Report, Requisition Status Report (3), and Value of Commodities Received - RA (4). The main content area displays the 'Welcome to Entitlement/Bonus Summary Report' page. It includes a search criteria section with fields for Program, Program Year, SDA Region Code, RA / SDA Number (pre-filled with 4007980), and Sold-To State. There are also buttons for Execute, Reset, Print to PDF, and Show Variants.

### \*Most frequently accessed reports included below:

- 1 Available Functions:** View Only-RA users see the Home, Admin, Reports, and Help tabs in the top navigation.
- 2 Entitlement Management Reports:** Displays summary of beginning and remaining entitlement balances, list of requisitions, and the impact of each request on balance.
- 3 Requisition Status Report:** Displays status and information for material line items throughout order life cycle.
- 4 Value of Commodities Received-RA Report:** Displays details on value of commodities received.



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