

Food Distribution Program WBSCM Assign Multi-Role Users

*Texas Department of
Agriculture*

USDA Division



TEXAS DEPARTMENT OF AGRICULTURE
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Updated 3/7/2024
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Food and Nutrition Division
Food Distribution Program

Acknowledgement Statement

You understand and acknowledge that:

- The training you are about to take does not cover the entire scope of the program; and that
- You are responsible for knowing and understanding all handbooks, manuals, alerts, notices, and guidance, as well as any other forms of communication that provide further guidance, clarification, or instruction on operating the program.

Course Introduction

Course Outline and Objectives



WBSCM Entitlement Course Outline

01

Introduction

Course Overview
and Objectives

02

Manage Users

Navigate portal
pathways to manage
user details

03

Assign User Role(s)

Assign user roles
based on appropriate
job function

Course Objectives and Outcomes

By the end of this course, participants will be able to:

- ❑ Understand how User Administrators assign multiple security roles to the same person in WBSCM.

WBSCM RA User Roles

RA User Roles	
1) User Admin-RA	Can create new users, update contact information, update assigned roles for users within their RA organization, and deactivate user accounts that are no longer needed.
2) Org Admin-RA	Maintains organization data and view users assigned to its organization.
3) Order Manager-RA	Role tasks include, but not limited to, creating requisitions, running entitlement/bonus reports, etc.
4) View Only-RA	Has access to order management, material pricing, and entitlement reports.



WHEN

Use this procedure for organizations who have one user fulfilling multiple roles in WBSCM.



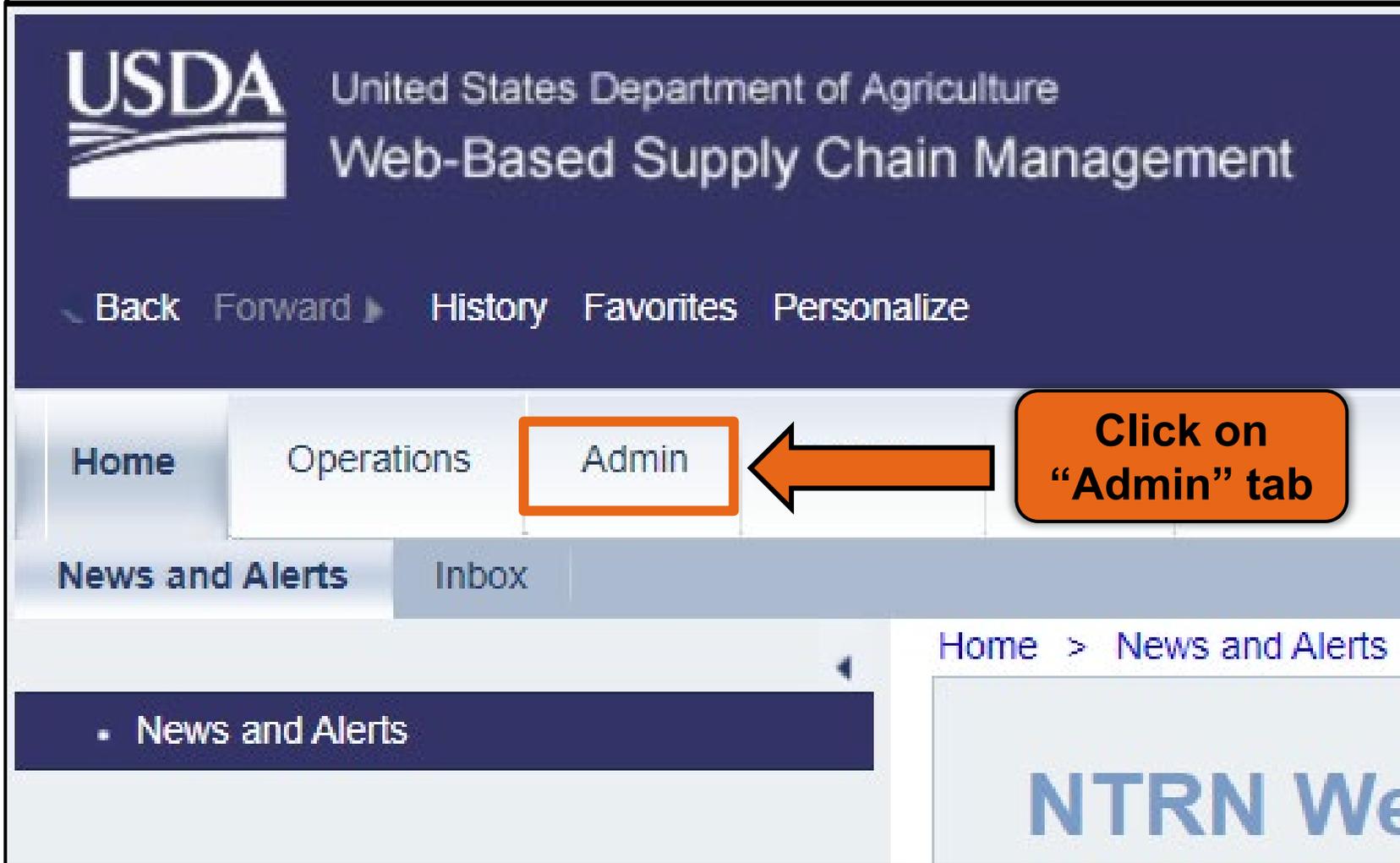
EXAMPLES

1. The Food Service Director is the only staff member and needs to see and do everything.
2. The Food Service Director appoints staff to perform separate functions
 - FSD: **User Admin** to manage staff
 - Staff #1: **Order Manager** to place requests & **Org Admin** to maintain organization data

Existing User: Assign Multiple Roles

Portal Pathway

Assign Multiple Roles



To assign a user multiple roles, follow the steps on each slide.

Assign Multiple Roles

Navigation bar: Back Forward History Favorites Personalize

Main menu: Home Operations Admin Reports Help

Sub-menu: Manage Users Master Data Organization Maintenance

Breadcrumbs: Admin > Manage Users > Manage Users

- + Maintain User Profile
- Manage Users**
- + User Security Report

Click on "Manage Users"

Welcome to Manage Users

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

Assign Multiple Roles

Manage Users

- Maintain User Profile
- Manage Users**
- User Security Report

Admin > Manage Users > Manage Users

Welcome to Manage Users

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

User Search Panel
All existing users listed here

User Selection

User Search Criteria:* Last Name Search Clear

	First Name	Last Name
<input type="checkbox"/>	CACI User2	RA
<input type="checkbox"/>	CACI User11	RA
<input type="checkbox"/>	Lemon 1 User8	RA
<input type="checkbox"/>	Lemon1 User3	RA
<input type="checkbox"/>	Lemon 1 User6	RA
<input type="checkbox"/>	Lemon 1 User10	RA
<input type="checkbox"/>	Lemon 1 User9	RA

Create New User

Assign Multiple Roles

User Selection

User Search Criteria:*

Last Name



Search

Clear

	First Name	Last Name	Last Logon Date
<input type="checkbox"/>	Lemon 1 User11	RA	
<input type="checkbox"/>			
<input type="checkbox"/>			

Create New User

Click on an existing User Search Criteria section in to add additional roles.

Assign Multiple Roles

Welcome to Manage Users

User Selection

User Search Criteria:* Last Name Search Clear

First Name Last Name

Company RA

Create New User

User Details

Personal Data Role Data Admin Data

Company:	<input type="text" value="0004007980"/>	Street Address:	<input type="text" value="1234 Easy Street"/>
User ID:	<input type="text" value="RAL0047"/>	City:	<input type="text" value="Austin"/>
Title:	<input type="text"/>	Zip Code:	<input type="text" value="78704"/>
First Name:	<input type="text" value="Lemon 1 User11"/>	Country:	<input type="text" value="USA"/>
Last Name:	<input type="text" value="RA"/>	State Or Province:	<input type="text" value="Texas"/>
Email:	<input type="text" value="TXNTRN+Lemon1User1..."/>	Time Zone:	<input type="text"/>

“User Details” panel will appear below “User Selection” panel.

Assign Multiple Roles

User Details

Personal Data **Role Data**

Company: 0004007980

User ID:

Title:

First Name:* Lemon1 User11

Last Name:* RA

Email:* TXNTRN+Lemon1User1... Time Zone:

Fax:

Mobile Phone:

Phone:

Click on the "Role Data" tab to assign user role(s).

Assign Multiple Roles

The screenshot displays a user management interface. At the top, a table lists users with columns for First Name, Last Name, and Last Logon Date. The first row is highlighted in yellow and contains the text 'Lemon 1 User11' and 'RA'. Below the table is a 'Create New User' button. The 'User Details' section has three tabs: 'Personal Data', 'Role Data', and 'Admin Data'. The 'Role Data' tab is active, showing a 'Current Roles:' section with a table containing one row: 'User Admin - RA'. An orange arrow points from the left towards this row. A large orange callout box with a black border is positioned over the 'Current Roles' table, containing the text: 'Roles currently assigned to user listed under "Current Roles"'. At the bottom of the interface, there are 'Modify User' and 'Delete User' buttons.

First Name	Last Name	Last Logon Date
Lemon 1 User11	RA	

Create New User

User Details

Personal Data | **Role Data** | Admin Data

Current Roles:

User Admin - RA

Modify User | Delete User

Roles currently assigned to user listed under "Current Roles"

Assign Multiple Roles

The screenshot displays a user management interface. At the top, a table lists users with columns for First Name, Last Name, and Last Logon Date. The first row is highlighted in orange and contains the text 'Lemon 1 User1' and 'RA'. Below the table is a 'Create New User' button. The 'User Details' section has three tabs: 'Personal Data', 'Role Data', and 'Admin Data'. The 'Role Data' tab is active, showing a 'Current Roles' section with a table containing one row: 'User Admin - RA'. An orange arrow points from a callout box to the 'Modify User' button at the bottom left of the interface.

First Name	Last Name	Last Logon Date
Lemon 1 User1	RA	

Create New User

User Details

Personal Data Role Data Admin Data

Current Roles:

User Admin - RA

Modify User

Click on "Modify User" to add more user roles to account.

Assign Multiple Roles

First Name	Last Name	Last Logon Date
Lemon 1 User11	RA	

Create New User

User Details

Personal Data | **Role Data** | Admin Data

Available Roles:

Order Manager - RA
Org Admin - RA
User Admin - RA
View-Only - RA

Add ▶

Current Roles:

User Admin - RA

◀ Remove

Modify User | Delete User | Save | Cancel

All available roles for user will appear.

Assign Multiple Roles

Click on
“Order
Manager”
to assign
role.

The screenshot displays a user management interface. At the top, a table lists user details:

First Name	Last Name	Last Logon Date
Lemon 1 User11	RA	

Below the table is a "Create New User" button. The "User Details" section has three tabs: "Personal Data", "Role Data", and "Admin Data". The "Role Data" tab is active, showing two lists:

- Available Roles:** A list with four items: "Order Manager - RA" (highlighted), "Org Admin - RA", "User Admin - RA", and "View-Only - RA".
- Current Roles:** A list with one item: "User Admin - RA".

Between the lists are "Add" and "Remove" buttons. At the bottom of the interface are buttons for "Modify User", "Delete User", "Save", and "Cancel".

Assign Multiple Roles

First Name	Last Name	Last Logon Date
Lemon 1 User11	RA	

Create New User

User Details

Personal Data **Role Data** Admin Data

Available Roles:

<input type="checkbox"/>	Order Manager - RA	<input type="button" value="Add"/>
<input type="checkbox"/>	Org Admin - RA	
<input type="checkbox"/>	User Admin - RA	
<input type="checkbox"/>	View-Only - RA	

Current Roles:

<input type="checkbox"/>	User Admin - RA
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Click the Add button.

Modify User Delete User Save Cancel

Assign Multiple Roles

The screenshot shows a user management interface for 'Lemon 1 User11' with role 'RA'. The 'Role Data' tab is active, showing a list of available roles and current roles. The 'Available Roles' list includes 'Order Manager - RA', 'Org Admin - RA', 'User Admin - RA', and 'View-Only - RA'. The 'Current Roles' list includes 'User Admin - RA' and 'Order Manager - RA'. An orange callout box with an arrow points to the 'Order Manager - RA' role in the 'Current Roles' list, stating: 'New role appears in "Current Roles" column.'

Available Roles:	Current Roles:
Order Manager - RA	User Admin - RA
Org Admin - RA	Order Manager - RA
User Admin - RA	
View-Only - RA	

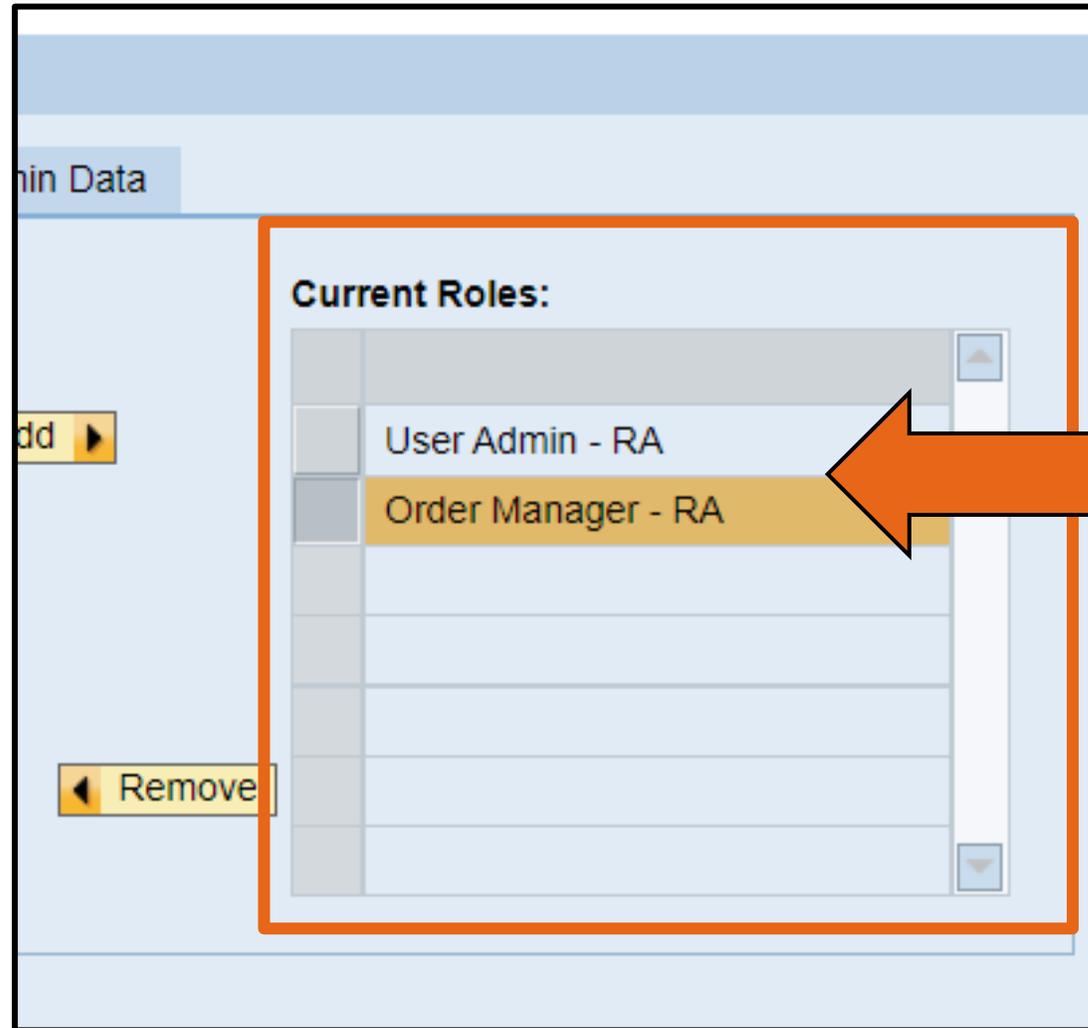
Assign Multiple Roles

The screenshot shows a user management interface for 'Lemon 1 User11'. The 'Role Data' tab is selected, displaying two lists: 'Available Roles' and 'Current Roles'. The 'Available Roles' list includes 'Order Manager - RA', 'Org Admin - RA', 'User Admin - RA', and 'View-Only - RA'. The 'Current Roles' list includes 'User Admin - RA' and 'Order Manager - RA'. An orange callout box with the text 'Click "Save" to complete adding a new role(s).' has an arrow pointing to the 'Save' button at the bottom and another arrow pointing to the 'Order Manager - RA' role in the 'Current Roles' list.

Available Roles:	Current Roles:
Order Manager - RA	User Admin - RA
Org Admin - RA	Order Manager - RA
User Admin - RA	
View-Only - RA	

Buttons: Create New User, Modify User, Delete User, Save

Assign Multiple Roles



All roles currently assigned to new user will appear in the "Current Roles" column.

Assign Multiple Roles

**Assign New User
Role Complete!**



**Repeat process to
add additional roles
as needed.**

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 Office of the Assistant Secretary for Civil Rights
 1400 Independence Avenue, SW
 Washington, D.C. 20250-9410; or
- 2. **fax:**
 (833) 256-1665 or (202) 690-7442; or
- 3. **email:**
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