# Food Distribution Program Create New Users in WBSCM

*Texas Department of Agriculture*

*USDA Division*

TEXAS DEPARTMENT OF AGRICULTURE
**COMMISSIONER SID MILLER**

Fraud Hotline: 1-866-5-FRAUD-4 or 1-866-537-2834 | P.O. Box 12847 | Austin, TX 78711
Toll Free: (877) TEX-MEAL | For the hearing impaired: (800) 735-2989 (TTY)
This product was funded by USDA.
This institution is an equal opportunity provider.

Food and Nutrition Division
Food Distribution Program

Updated 3/7/2024
www.SquareMeals.org

# 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

01

Course Outline and Objectives

**Introduction**

**01** Course Overview and Objectives

**Create New User**

**02** Navigate portal pathways to create new users

**Assign User Role(s)**

**03** Assign user roles based on appropriate job function

# WBSCM Entitlement Course Outline

# **Course Objectives and Outcomes**

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

❑ Understand how User Administrators create a new user and assign security roles in WBSCM.

# Create New User

02

## Portal Pathway

## WHEN

Use this procedure when new staff join RA Organizations

## WHY

Use this procedure to create new users and assign security roles in WBSCM.

# Create A New User



Click on Admin

To create a new user, follow the steps on each slide.

# Create A New User

# Create A New User

**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 Selection**

User Search Criteria:* [Last Name ▼] [_____] [Search] [Clear]

| | First Name | Last Name |
|---|---|---|
| | CACI User2 | RA |
| | CACI User11 | RA |
| | Lemon 1 User8 | RA |
| | Lemon1 User3 | RA |
| | Lemon 1 User6 | RA |
| | Lemon 1 User10 | RA |
| | Lemon 1 User9 | RA |

[Create New User]

**User Search Panel**

**Existing users listed here**

# Create A New User



**Enter New User Name in the Search Criteria field to prevent creating duplicate user profiles**

# Create A New User

**User Selection**

**User Search Criteria:*** [Last Name ▼]

First Name
Last Name

**Click on dropdown to search by First Name if desired**

| | First Name | Last Name | ogon Date |
|---|---|---|---|
| | CACI User2 | RA | 2022-05-2 09:57:55 |
| | CACI User11 | RA | 2022-05-2 10:01:54 |
| | Lemon 1 User8 | RA | 2022-05-6 14:45:11 |
| | Lemon1 User3 | RA | 2022-05-6 13:48:26 |
| | Lemon 1 User6 | RA | 2022-05-6 19:51:02 |
| | Lemon 1 User10 | RA | 2022-05-6 14:48:47 |
| | Lemon 1 User9 | RA | 2022-05-6 14:46:56 |

[Create New User]

# Create A New User

**User Selection**

**User Search Criteria:** * | First Name ▼ | CACI User11 |



Enter Name of New User to Prevent Duplication
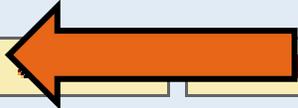
| First Name | Last Name | Last L... |
|---|---|---|
| CACI User11 | RA | 2022-05-2 10:01:54 |
|  |  |  |
|  |  |  |
|  |  |  |

Create New User

# Create A New User

**User Selection**

User Search Criteria:* | First Name ▼ | CACI User11 | Search | Clear

| | First Name | Last Name | Last Logon Date |
|---|---|---|---|
| | CACI User11 | RA | 2022-05-2 10:01:54 |
| | | | |
| | | | |
| | | | |

Create New User

- **If user appears in search, do not continue creating new user**

- **Review and update existing user profile**

# Create A New User

**User Selection**

User Search Criteria:* | First Name ▼ | Lemon1 User11 | Search | Clear

| First Name | Last Name | Last Logon Date |
|---|---|---|
| | | |

**If no profile exists, continue and click Create New User**

Create New User

# Create A New User

**User Selection**

User Search Criteria:* | First Name ▼ | Lemon1 User11 | Search | Clear

| First Name | Last Name | Last Logon Date |
|---|---|---|
| | | |
| | | |
| | | |

Create New User

**User Details**

| Personal Data | Role Data | Admin Data |

Company: 0004007980          Street Address:

User ID:                     City:

Title:          ▼            Zip Code:

First Name:*                 Country:*          ▼

Last Name:*                  State Or Province:          ▼

Email:*                      Time Zone:          ▼

Fax:

Mobile Phone:

Phone:

Save   Cancel

**User Details Panel will appear after clicking Create New User**

# Create A New User

**User Details**

| Personal Data | Role Data | Admin Data |

Company: 0004007980
Street Address:

User ID:
City: Austin

Title: [dropdown]
Zip Code: 78704

First Name:* Lemon 1 User11
Country:* USA [dropdown]

Last Name:* RA
State Or Province: Texas [dropdown]

Email:* TXNTRN+Lemon1User1...
Time Zone: [dropdown]

Fax:

Mobile Phone:

Phone:

Save  Cancel

**Enter New User Information**

- **Complete required fields.**

- **Enter City, State, and Zip Code to prevent error message and continue new user creation.**

- **Enter all known data if possible.**

# Create A New User

**User Details**

| Personal Data | Role Data | Admin Data |

Company: 0004007980

User ID: 

Title: 

First Name:* Lemon1 User11

Last Name:* RA

Email:* TXNTRN+Lemon1User1...

Fax: 

Mobile Phone: 

Phone: 

Street Address: 

City: 

Zip Code: 

Country:* USA

State Or Province: 

Time Zone: 

Save

**Click save.**

# Assign Role Data

**User Details**

| Personal Data | Role Data | Admin Data |

| Company: | 0004007980 | Street Address: | |
| User ID: | | City: | |
| Title: | | Zip Code: | |
| First Name:* | Lemon1 User11 | Country:* | USA |
| Last Name:* | RA | State Or Province: | |
| Email:* | TXNTRN+Lemon1User1... | Time Zone: | |
| Fax: | | | |
| Mobile Phone: | | | |
| Phone: | | | |

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

Save   Cancel

# Assign Role Data



**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:**

| | |
|---|---|
| | Order Manager - RA |

◀ Remove

Save | Cancel

**All available roles for new users appear in the Available Roles column.**

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

# WBSCM RA User Roles

| RA User Roles | |
|---|---|
| **1) Org Admin-RA** | Maintains organization data and view users assigned to its organization. |
| **2) 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. |
| **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. |

# Assign Role Data

**User Details**

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

**Available Roles:**

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

Add ▶

◀ Remove

**Current Roles:**

| Order Manager - RA |

Save | Cancel

**Click on role to assign user**

# Assign Role Data

**User Details**

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

**Available Roles:**

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

Add ▶

◀ Remove

**Current Roles:**

**Click "Add" after selecting desired role**

Save | Cancel

# Assign Role Data



Selected role will appear in Current Roles panel.

# Assign Role Data

**User Details**

| Personal Data | Role Data | Admin Data |

**Available Roles:**

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

Add ▶

◀ Remove

**Current Roles:**

| Order Manager - RA |

Save  Cancel

**Repeat the process to assign additional roles to user if needed**

# Assign Role Data

# Create A New User

**User Selection**

User Search Criteria:* | Last Name ▼ | [            ] | Search | Clear

| | First Name | Last Name | Last Logon Date |
|---|---|---|---|
| | Lemon 1 User11 | RA | |
| | Lemon 1 User8 | RA | |
| | Lemon 1 User9 | RA | 2022-05-6 14:46:56 |
| | Lemon 1 User5 | RA | 2022-05-6 14:34:08 |

Create New User

**User Details**

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

Company: [            ]  Street Address: [            ]

User ID: [            ]  City: [            ]

Title: [    ]  Zip Code: [            ]

First Name: [            ]  Country: [            ]

- **New user will appear in the User Selection Panel**

- **User Details are cleared and ready for creation of additional users.**

# Create A New User



**Select user and click on "Personal Data" and "Role Data" tabs to confirm user information.**

# Create A New User

**Create New User Complete!**

**Repeat process to create new users as needed.**

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: https://www.usda.gov/sites/default/files/documents/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.pdf, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1.  **mail:**
    U.S. Department of Agriculture
    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:**
    program.intake@usda.gov

This institution is an equal opportunity provider.

TEXAS DEPARTMENT OF AGRICULTURE
**COMMISSIONER SID MILLER**

Fraud Hotline: 1-866-5-FRAUD-4 or 1-866-537-2834 | P.O. Box 12847 | Austin, TX 78711
Toll Free: (877) TEX-MEAL | For the hearing impaired: (800) 735-2989 (TTY)
This product was funded by USDA.
This institution is an equal opportunity provider.

Food and Nutrition Division
Food Distribution Program

30

Updated 3/7/2024
www.SquareMeals.org