WBSCM User Roles
Frequently Asked Questions

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WBSCM Transition Communication and Announcements

- [https://squaremeals.org/Programs/FDP-WBSCM-Transition-Project](https://squaremeals.org/Programs/FDP-WBSCM-Transition-Project)

WBSCM Account Access Information JotForm

1. When do we tell you who we want in those roles?
   - The JotForm indicating the staff you would like assigned to each role is open from **February 28 to April 28, 2023**.

2. When is the jot form due? It seems like we may need our district calendar for SY 23-24.
   - The JotForm closes **April 28, 2023**. If your district calendar is not yet complete, you may estimate the 2023 Fall and Winter Breaks. This information is used when planning for training and important communications.

WBSCM User Role Documentation

3. Is there a document that gives a detailed description of each role?
   - Yes. Refer to the User Role One-Pagers and Quick Start Guide on the WBSCM Transition webpage in the Training section under RA105 WBSCM Account Set Up.

WBSCM User Roles

Multiple Roles for One User

4. Can 1 person such as the Director be all 4 roles?
   - Yes. One user who is assigned all four roles will see the Operations, Admin, and Reports tabs on the same screen with just one login.
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5. As an Admin User are you allowed to give yourself the order manager authorization so that you can be a backup to ordering?
   • Yes.

6. Can one person be assigned to more than one duty?
   • Yes.

7. Can the User admin and Org. Admin be the same person?
   • Yes.

Multiple Roles in Small Districts

8. What do small districts do with limited staff so that an administrator could do all roles if needed? This system seems to require multiple users just to function.
   • The User Admin can assign all four roles to themselves.

9. I appreciate these levels of access but it seems that it will be very cumbersome for small districts who only have one or two people responsible for all duties.
   • The User Admin can assign all four roles to themselves.
   • The four roles can be split between two people.
   • However, there can only be one person assigned the role of User Admin.

Logging in When Assigned Multiple Roles

10. As you demonstrated you had to switch between logins, will that be the same if we are assigned all roles, or will one log in give all access to the one log in?
   • One user who is assigned all four roles will see the Operations, Admin, and Reports tabs on the same screen with just one login.
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11. It looks like separate logins required for each role? :

- In general, no. Separate logins are not required for each role. Users assigned to multiple roles will have one login.
- For Direct-Ship schools only: there will be a separate login for receipting. One login is for the individual user role (User Admin, Order Manager, etc.). The second login will be as a “Ship-To” for submitting receipts. The login screen will look similar to this:

![Login Screen](Image)

User Administrator

12. How many user admins can you have?

- Only one User Admin is allowed.

13. Can the user Admin complete the same functions as the order manager?

- In general, if a functionality or capability is not included in the description on the User Role one-pager, that user role does not have that capability.
- No, the User Admin cannot complete the same functions as the Order Manager.
- The User Admin can assign the Order Manager role to themselves.

Order Manager

14. How many order managers can we have?

- Unlimited
- The JotForm will only collect up to 6, however, more can be added later.
**Organization Administrator**

15. Who might have the organization administrator role? Is it necessary to have someone in this role?

- It is necessary to have someone in this role in order to update the organization contact information.
- Anyone in your organization can be assigned the role.
- The User Admin can assign the Org Admin role to themselves if desired or needed.

16. For Organization Admin, what does maintain organization data mean? What is included in organization data?

- Organization information such as address and contact information.

**RA Account Access**

**RA Account Access: Create an Account**

17. Is TDA setting up the User Admin Profiles?

- Yes. Once TDA collects all user information via the WBSCM Account Access JotForm, TDA will provide the necessary information to USDA. USDA will create the accounts.

18. How do I create an account. When do we get account log in information?

- WBSCM Account Setup for RA User Administrators and RA Order Managers will occur during WBSCM training provided by ESCs in Fall 2023.
- Please **do not** contact WBSCM Help Desk for an account. They will not be able to assist you.
- Contact your ESC for more information.

19. There are some RAs who are attempting to request WBSCM access directly from the WBSCM website or via the WBSCM Help Desk.

- TDA is the only entity that can provide that access.
- Please do not attempt to request access directly from the WBSCM site or via the WBSCM Help Desk.
- ESCs will provide training logins and the link to the WBSCM NTRN training portal for RAs to practice with during ESC training in Fall 2023.
RA Account Access: FSMCs and Co-op Coordinators

20. Can FSMC’s be given access to WBSCM?

TDA is not providing that access as this is a type of “bank account” and giving that type of access to anyone that does not directly work for the RA responsible for that account would be a high security risk from a systems security standpoint. TDA is developing a resource to help RAs understand when it may be okay for them to provide access to an external company, such as an FSMC.

However, this decision must be given much more scrutiny than in the past. RAs must reference internal financial controls for providing an external company with access to their financial account. This is important because the level of access we are discussing gives the external company the ability to spend the funds in that account on the RA’s behalf. From an audit standpoint, this comes with a high degree of risk that would require strong controls to oversee and manage.

RA employees that are asking these types of questions should plan to attend the training.

21. Can the FSMC employee or Co-op Coordinator have view only access?

No. FSMCs and Co-Ops cannot have direct access to WBSCM.