WBSCM New User Registration

2 Key Steps to Access WBSCM

Create **Login**.gov ID and link to eAuth | Register WBSCM Account
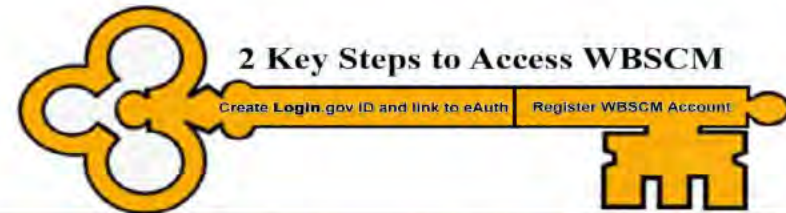
A WBSCM account must **first** be created by the **User Administrator** or the user's organization. Once this account is created, WBSCM automatically generates a registration email that is sent to the user with steps to create a Login.gov ID, link it to the eAuthentication (eAuth) system, and register their WBSCM account. This registration email should be saved until the Login.gov ID is successfully linked to the WBSCM account(s).

Create Login.gov ID and link to eAuth

Step 1: Create Login.gov ID and link to eAuth

Skip to Step 2 if you are a USDA Federal Employee, Affiliate, or Contractor or if you already have an existing eAuth account to access any non-WBSCM application.

❖ Go to the USDA eAuthentication page (**https://www.eauth.usda.gov/eauth/b/usda/login**) select **Customer**, then **Login**.gov login option.

- Users with an existing Login.gov account, **Sign in** with your existing credentials and complete the steps to perform a one-time process to link the Login.gov ID with USDA eAuth.
- To create a new Login.gov account, choose **Create an account**; provide a unique email address, establish multi-factor authentication, and return to eAuth to link the new account with eAuth.

❖ Users who do not have an existing eAuth account, when linking Login.gov ID to eAuth, must choose **Continue without linking to an existing eAuth account** option.

❖ After Login.gov credentials are created and successfully linked to eAuth, the **Account Information** page displays a summary of the user's Login.gov credentials with a green Linked checkmark. This completes Step 1. **Log out**, and go to Step 2 to register your WBSCM account.

Users with a non-WBSCM application eAuth ID have the option to migrate to new Login.gov credentials and link it to their existing eAuth ID or continue using eAuth ID.

Register WBSCM Account

Step 2: Register WBSCM Account

❖ Click the unique link in Step 2 of the WBSCM Account Registration email.
- **Customers, Vendors, Business Partners**: log in using newly created Login.gov ID or using the non-WBSCM application existing eAuth ID.
- **USDA Federal Employees, Affiliates, Contractors**: log in using PIV/Lincpass credentials.

❖ Accept the Rules of Behavior (ROB) and access WBSCM. Registration is complete. If the ROB is not accepted, the WBSCM account gets locked.

❖ An active Login.gov ID or PIV/Lincpass can be linked to more than one WBSCM account. If user has multiple WBSCM accounts, a selection screen prompts user to select the account to log into WBSCM.

❖ WBSCM login errors could be due to:
- The user logged in with the wrong Login.gov ID (or eAuth ID).
- Login.gov ID is not linked to USDA eAuth.
- WBSCM account is not successfully registered.
- WBSCM ROB have not been accepted.
- There is a Last Name and Email address mismatch between the Login.gov ID (or eAuth ID) and the WBSCM account.
- The WBSCM account is locked or inactive.

Helpful Tips:

- Bookmark the WBSCM website: **https://portal.wbscm.usda.gov/**
- Login.gov or PIV/Lincpass credentials must match the user's last name and email address in WBSCM in order to successfully register the WBSCM account.

Additional resources on the USDA WBSCM page (**https://www.usda.gov/wbscm**)
- WBSCM New User Registration Video
- Multiple WBSCM Account Registration Job Aid
- Contact your User Administrator or WBSCM Service Desk (877-WBSCM-4U) for assistance.

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WBSCM Document Types and Number Ranges

Document Type	Scenario	Document Type	Type Description	Number Range	SUS Number Range	Agency
Sales Requisitions						
	Domestic	ZREQ	Domestic Requisitions	1000000000 - 1899999999		FNS
Sales Contracts						
	International - FAS	ZCON	FAS Agreements	5000000001 - 5899999999		FAS
Sales orders						
	Domestic	ZDOM	Domestic Sales order	5000000001 - 5899999999		FNS; AMS
	International - FAS	ZFAS	FAS Sales order	5000000001 - 5899999999		FAS
	International - USAID	ZAID	USAID Sales order	5000000001 - 5899999999		USAID
Other Sales Documents						
	Domestic	ZDCB	Domestic Credit Memo	5000000001 - 5899999999		FNS
	Domestic	ZDDB	Domestic Receivable	5000000001 - 5899999999		FNS
	Domestic	ZDEC	Entitlement Decrement	5000000001 - 5899999999		FNS
	Domestic	ZINC	Entitlement Increment	5000000001 - 5899999999		FNS
	Domestic	ZEMG	Domestic Emergency	5000000001 - 5899999999		FNS
	Domestic	ZPSS	Price Support Sales	5000000001 - 5899999999		FSA
	Domestic	ZRDC	Redonation Credit Mem Request	5900000000 - 5999999999		FNS
	Domestic	ZDRO	Redonation Order	5900000000 - 5999999999		FNS
	Domestic	ZRE	Redistirbution Sales Order	1900000000 - 1999999999		FNS
	Domestic	ZRCR	Redistribution Credit Memo Request	1900000000 - 1999999999		FNS
	International	ZICB	INTL Credit Memo Request	5000000001 - 5899999999		USAID
	International	ZIDB	Intl Debit Memo Request	5000000001 - 5899999999		USAID
	International	ZSCR	Swap.Int.Credit Memo Request	5000000001 - 5899999999		USAID
	International	ZSW	Intl. Swap Order	5000000001 - 5899999999		USAD
Purchase Requisition						
	Domestic	ZDOM	Domestic Purchase Requisition	1000000000 - 1999999999		AMS; FSA
	Domestic	ZDBX	Barter/Exchange Purchase Requisition	1000000000 - 1999999999		FSA
	Domestic	ZDER	Emergency Purchase Requisition	1000000000 - 1999999999		AMS; FSA
	Domestic	ZDSB	Processing	1000000000 - 1999999999		FSA
	International	ZINT	INTL Commodity Purchase Requisition	2000000000 - 2999999999		USAID; FAS; FSA
	International	ZIFR	Freight FAS Purchase Requisition	2000000000 - 2999999999		USAID
	International	ZIFA	Freight AID Purchase Requisition	2000000000 - 2999999999		USAID
	Long Term Contracts	ZFOR	Forecast Requirement	3000000000 - 3999999999		FNS; USAID
	Replenishment - Multi-food and prepo warehouse	NB	Warehouse Replenishment	4000000000 - 4999999999		FNS; USAID; AMS
Bid Invitation						
	Domestic	ZDMI	Domestic Commodity	2000000000 - 2999999999		AMS; FSA
	Domestic and International	ZMSI	Master/Shortfall	2000000000 - 2999999999		FSA
	International	ZCIN	INTL Commodity	2000000000 - 2999999999		FSA
	International	ZFIN	INTL Freight	2000000000 - 2999999999		FSA
	International	ZICP	INTL Commodity Preferences	2000000000 - 2999999999		FSA
	International	ZIFP	INTL Freight Preferences	2000000000 - 2999999999		FSA
Bid Response						
	Domestic and International	QUOT	Bid Response	3000000000 - 3999999999		AMS; FSA
Contract						
	All Contracts	ZCID	IDIQ (Indefinite Delivery, Indefinite Qty)	4400000000 - 4499999999		AMS
	All Contracts	ZSER	FAR Services	4400000000 - 4499999999		FSA
	All Contracts	ZNSR	Non-FAR Services	4400000000 - 4499999999		FSA
	Domestic Freight	ZCFT	Freight Rate Table	4400000000 - 4499999999		FSA
Purchase Order						
	Domestic	ZDOM	Domestic Purchase Orders	4100000000 - 4199999999	3100000000 - 3199999999	FNS; AMS
	Domestic	ZDPS	Price Support Purchase orders	4100000000 - 4199999999	3100000000 - 3199999999	FSA
	Domestic	ZDER	Emergency Purchase Orders	4100000000 - 4199999999	3100000000 - 3199999999	FSA; AMS
	International	ZINT	INTL Commodity Purchase Order	4210000000 - 4219999999	3100000000 - 3199999999	FSA
	International	ZIFR	INTL Freight FAS Purchase Order	4250000000 - 4259999999	3100000000 - 3199999999	FSA; FAS
	International	ZIFA	INTL Freight AID Purchase Order	4250000000 - 4259999999	3100000000 - 3199999999	FSA; USAID
	Domestic and International Services	ZSER	FAR Services	4300000000 - 4399999999	3100000000 - 3199999999	
	Domestic and International Services	ZNSR	Non-FAR Services	4300000000 - 4399999999	3100000000 - 3199999999	
ASN						
	All ASN's		N/A		6100000000 - 6199999999	FNS; AMS
	Delivery Document	EL	Inbound Delivery	0180000000-0182999999		FNS; USAID; FSA
Material Documents						
	Material Types -Goods receipts	101/(102)	Goods Receipt (Reversal)	5000000000 - 5999999999		FNS; FSA

WBSCM Document Types and Number Ranges

	Material Types -Goods receipts	107/(108)	Goods Receipt to VAL Blocked Stock (Origin Acceptance)	**5000000000 - 5999999999**		FNS; FSA; USAID
	Material Types -Goods receipts	109/(110)	Goods receipt from VAL Blocked Stock	**5000000000 - 5999999999**		FNS; FSA; USAID
	Material Types - Goods Issue	541/(542)	Goods Issue Warehouse to Sub-contracting Stock	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Goods Issue	543/(544)	Goods Issue from Sub-contracting Stock	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Goods Issue	551/(552)	Goods Issue Scrapping	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Goods Issue	555/(556)	Goods Issue Scrapping Block	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Goods Issue	601/(602)	Goods Issue to Customer	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Transfer Posting	303/(304)	Transfer Posting Plant to Plant	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Transfer Posting	311(312)	Transfer Posting Stor Loc to Stor Loc	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Transfer Posting	344/(345)	Transfer blocks to Unrestricted	**4900000000 - 4999999999**		FNS; FSA; USAID
	Material Types - Stock Balance	561/(562)	Inventory Adjustments	**4900000000 - 4999999999**		FNS; FSA; USAID
Inspection Lots						
	All Inspection Lots			**1000000000 - 1999999999**		FNS; FSA; USAID
Invoice						
	SUS Invoice Documents		Parked Invoice	**7100000000 - 7199999999**	7100000000 - 7199999999	ALL
	Logistics Invoice	RE	MM Invoice	**7100000000 - 7199999999**		ALL
	Finance Invoice	RE	FI Invoice	**5100000000 - 5199999999**		ALL
Clearing Documents						
	Vendor payment	KZ	Payment Posting (Interface from NPS)	**2000000000-2999999999**		ALL
	Vendor Offset	KA	Payment Posting (Interface from NPS)	**1700000000-1799999999**		ALL
	Vendor TaxW	KA	Payment Posting (Interface from NPS)	**1700000000-1799999999**		ALL
Delivery Documents						
	Domestic	ZDLF	Outbound Delivery - Domestic	**008000000 - 0083999999**		FNS; FSA
	International	ZILF	Outbound Delivery - International	**008000000 - 0083999999**		USAID
	Domestic and International	LB	Delivery for Subcon.	**008000000 - 0083999999**		FNS; FSA
	Domestic and International	ZTPB	Del for 3rd-P Barter	**008000000 - 0083999999**		FNS; FSA
Customer Receivables						
	Customer Write off	DG	Customer Write Off	**1606000000-1606999999**		ALL
	Sales of Price Support	RV	Customer Invoice	**2800000000-2899999999**		ALL
	Sales of Price Support	DZ	Customer Payment	**1400000000-1499999999**		ALL
Other Receivables						
	MARAD Receivables	Y4	MARAD Receivable	**1800000000-1899999999**		USAID; FAS
Vendor Credit-Damage/Loss						
	Vendor Credit - Domestic Damage/Loss	Y1	Comm/Frt/Process los	**1900000000-1999999999**		ALL
	Vendor Credit - Domestic Damage/Loss	Y2	Warehouse losses	**1900000000-1999999999**		ALL
	Vendor Credit - Domestic Damage/Loss	Y3	Ocean carrier losses	**1900000000-1999999999**		ALL
	Vendor Credit - International Damage/Loss	Z1	Stvdr loss fr Inv	**1900000000-1999999999**		ALL
	Vendor Credit - International Damage/Loss	Z2	Stvdr loss fr Cmdy	**1900000000-1999999999**		ALL
	Vendor Credit - International Damage/Loss	Z3	Ocn Carr loss fr Inv	**1900000000-1999999999**		ALL
	Vendor Credit - International Damage/Loss	Z4	Ocn Carr loss fr Cmd	**1900000000-1999999999**		ALL
Internal Orders						
	Internal Orders	BUDG	Reporting & Emergency with Budget	**400000 - 499999**		ALL
	Internal Orders	ENTL	Entitlement Order Type	**A - ZZZZZZZZZZZZ**		FNS
	Internal Orders	FASA	Agreements Order Type	**A - ZZZZZZZZZZZZ**		FAS
	Internal Orders	REPO	Reporting & General Order Type	**500000 - 599999**		ALL
	Internal Orders	STOR	Storage & Handling	**700000 - 799999**		ALL

Document Type	Type	Transaction Type Description	SRM Range	ECC Range	SUS Range	SUS Range
Material Master						
Material Master	ZCMD	Commodity	External	100000-199999	N/A	
Material Master	ZSER	Services	External	300000-399999	N/A	
Material Master	ZFRT	Freight	External	FXXXXXXXXXXXXXX	N/A	
Material Master	ZNSC	Non-Standard Commodity	External	900000-999999	N/A	
Bill of Material						
Bill of Material Group	5	Sales and Distribution	N/A	00000000-99999999	N/A	
Customer Business Partners						
Business Partner	ZSDA	State Distributing Agency (SDA)	N/A	40000000-49999999	N/A	FNS
Business Partner	ZRA	Recipient Agency (RA)	N/A	40000000-49999999	N/A	FNS
Business Partner	ZCOP	Co-op Organization	N/A	40000000-49999999	N/A	FNS
Business Partner	ZPVO	Private Voluntary Organization (PVO)	N/A	40000000-49999999	N/A	
Business Partner	ZISH	International Ship-to Organization	N/A	50000000-59999999	N/A	
Business Partner	ZDSH	Domestic Ship-to Organization	N/A	50000000-59999999	N/A	FNS
Procurement Business Partners						
Business Partner	ZCVN	Central Vendors	10000000-19999999	External	External	
Business Partner	ZPVN	Plant Vendors	11000000-11999999	External	External	
Business Partner	ZSPV	Shipping Point	12000000-12999999	External	External	
Business Partner	ZFRA	Freight Agent	13000000-13999999	External	External	
Business Partner	ZVCP	Contact	20000000-29999999	External	External	
Business Partner	ZLOC	Locations	External	External	External	
Quality Management						
Master Inspection Characteristics	N/A	N/A	N/A	N/A	N/A	
Inspection Plans	N/A	N/A	N/A	N/A	N/A	
Document						
Documents	Z01	USDA CRD/Annmnt Doc	N/A	10000-99999	N/A	

Purpose	This job aid provides the steps to add a WBSCM transaction as a Portal Favorite. WBSCM transactions that are used often can be saved as a **Favorite**. When you select a Favorite link, it directly opens the transaction. This job aid also reviews the steps to delete and maintain Favorites.
Target Audience	All WBSCM Users

WBSCM Home Page

WBSCM Home Page Navigation

The WBSCM Home Page is divided into the following three panels:

1. The **Portal Banner** panel contains:
    *   The USDA and WBSCM system logos
    *   Session Navigation buttons
    *   Menu Bar links
    *   Module Navigation and Help buttons
    *   Personal User Navigation links
    *   Breadcrumbs
    *   Portal Navigation Options
2. The **Portal Transactions** panel displays the contents of the WBSCM module selected.
3. The **Contents** panel contains the transaction details.

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WBSCM Home Page

WBSCM Home Page – Portal Banner Navigation

The **Portal Banner** contains the following sections:

1. Menu Bar
   - **Page Navigation** links – Displays previous (Back) and next (Forward) screens.
   - **History** link – Displays previously used transactions.
   - **Favorites** link – Displays options to access and maintain Portal Favorites.
2. Module Tabs
   - **Modules** – Displays WBSCM modules based on role-based access.
   - **Help** – Directs to the Training and Help Desk pages.
3. Module Sub-Tabs – Displays module sub-tabs based on the primary WBSCM Module selected. WBSCM Home Page defaults to:
   - **News and Alerts** – Displays key news (available through Forum postings and system alerts, when applicable).
   - **Inbox** – Displays applicable actions for the user.
4. Breadcrumbs – Displays the WBSCM Portal menu path. This menu path is based on the Module tabs, Module Sub-tabs, and Portal Transaction selection.
5. Portal Navigation Options
   - **Full Screen** button – Hides the Module tabs and Module Sub-tabs links, displaying only the Breadcrumbs, Menu Bar, and Contents panel.
   - **Options** button – Provides links to open a new session, refresh the transaction, access Context-sensitive Help, access transaction details, and add a transaction to the WBSCM Portal Favorites.

WBSCM Home Page

Add a Favorite

The **Favorites** dropdown displays the following options:

- **Add to Favorites** – Adds the current transaction to the Favorites.
- **Organize Favorites** – Displays Favorites and allows organization as appropriate.

By default, Favorites display in the **Favorites** dropdown in alphabetical order.

1. Navigate to the transaction to add as a Favorite
2. Create a Favorite using the **Favorites >Add to Favorites** portal path from the transaction.
3. The bookmarked transaction appears in the **Favorites** dropdown.

Do not create Favorites for the following transactions as they may not work as expected; it is recommended to access these transactions directly from the Portal standard navigation:

- Maintain Catalogs - FNS, FSA
- Maintain Sales Documents - FNS, FSA, USAID
- Maintain Sales Order - FAS
- Create/Display Recall - FNS
- Display FNS Recall - SDA
- Display FAS Contract - FAS

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Organize Favorites
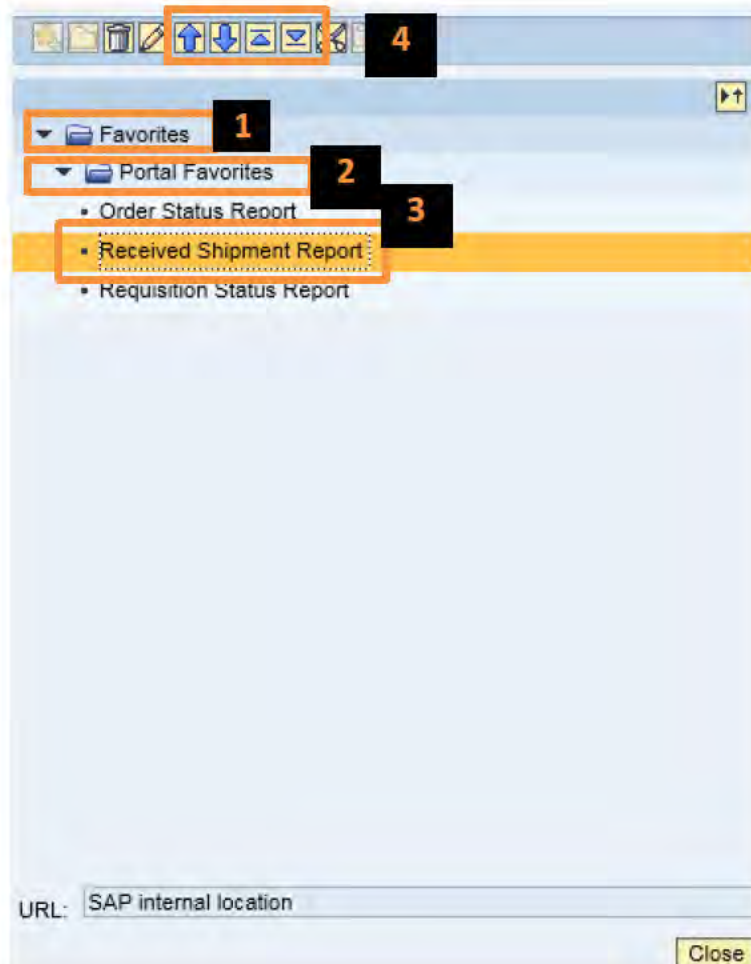
Sort Favorites

Use the Organize Favorites feature to sort the Favorites.

Sort Favorites using the WBSCM Portal path: **Favorites > Organize** link. The Organize Favorites window displays.

1. Click (the **Favorites** folder item) to expand the Favorites folder.

2. Click (the **Portal Favorites** folder item) to expand the Portal Favorites subfolder.

3. All saved Favorites display in alphabetical order by default.

4. Highlight a Favorite and move it to the required location using one of the following icons:

   - Click (the **Up** arrow icon) to move the highlighted Favorite to the previous line in the list of Favorites.

   - Click (the **Down** arrow icon) to move the highlighted Favorite to the next line in the list of Favorites.

   - Click (the **Top** arrow icon) to move the highlighted Favorite to the first line in the list of Favorites.

   - Click (the **Bottom** arrow icon) to move the highlighted Favorite to the last line in the list of Favorites.

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Organize Favorites
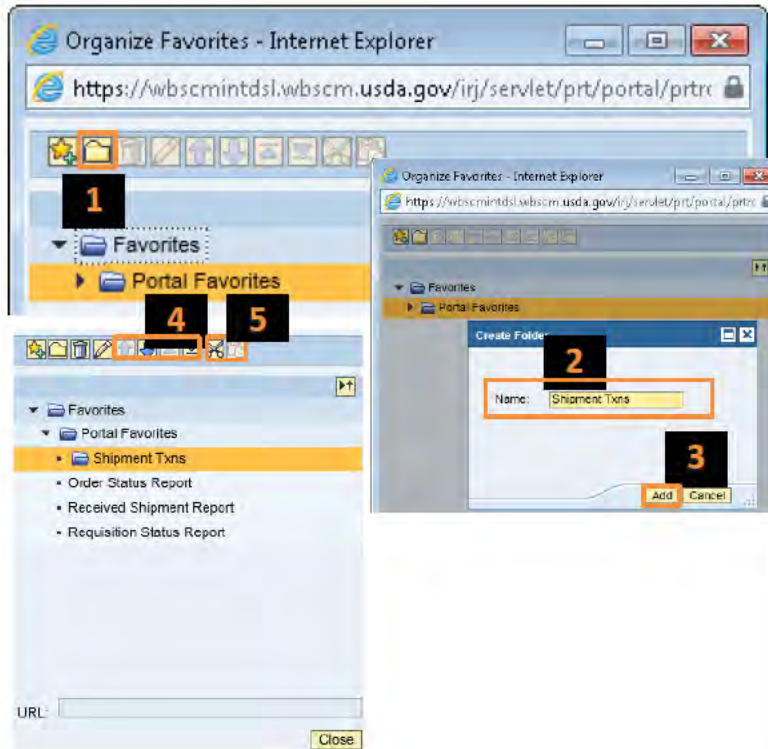
Add a Favorites Folder

Use the Organize Favorites feature to add a new Favorites folder, sort your Favorites, edit the standard transaction name, or delete a Favorite.

Start the transaction using the WBSCM Portal path: **Favorites > Organize Favorites > Portal Favorites** link. The Organize Favorites window displays.

1. Click ▢ (the **Create Folder** icon).
2. The **Create Folder** window displays. Type a new folder name in the **Name** field.
3. Click ▢ Add (the **Add** button).
4. The new folder displays at the end of the Favorites list and can be moved using arrow buttons.
5. Add existing Favorite link to new Favorites folder by highlighting favorite
    a) Highlighting Favorite link.
    b) Click ▢ (the **Cut** button).
    c) Highlight the new Favorites folder.
    d) Click ▢ (the **Paste** button) to add the Favorites link to the Favorites folder.

💡 **Paste** button is active after selecting the **Cut** button.

| **Organize Favorites** | **Delete a Favorite** |

Organize Favorites
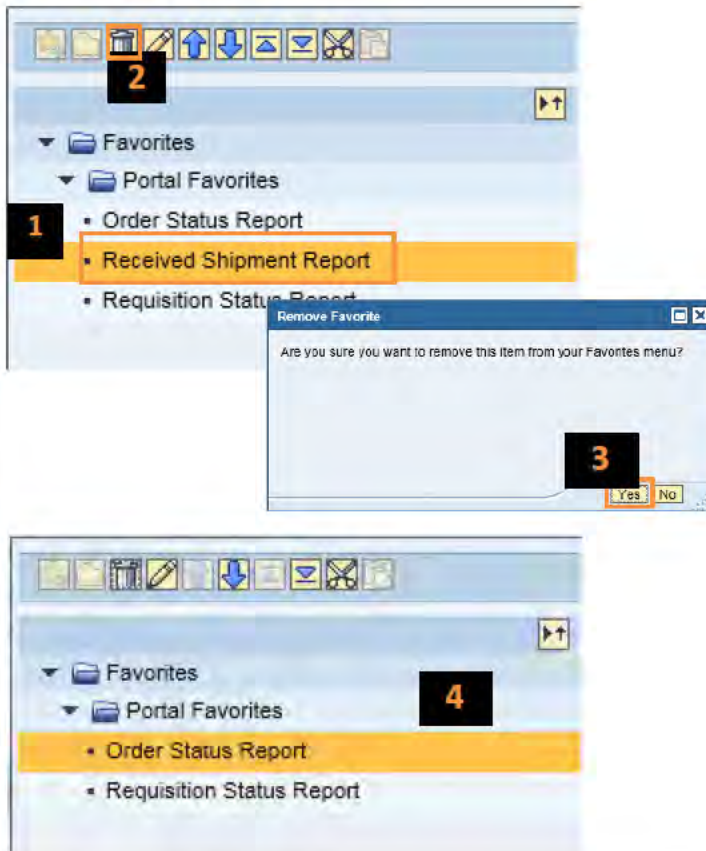
Delete a Favorite

Use the Organize Favorites feature to delete any unwanted Favorites.

Start the transaction using the WBSCM Portal path: **Favorites > Organize Favorites > Portal Favorites** link. The Organize Favorites window displays.

1. Highlight the Favorite to remove.
2. Click 🗑 (the **Delete** icon) to remove any unwanted transactions from your Favorites.
3. The **Remove Favorite** message window displays to ensure you want to remove the Favorite. Click Yes (the **Yes** button).
4. The **Favorites** list displays without the deleted Favorite.

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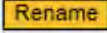
Organize Favorites

Rename a Favorite

Use the Organize Favorites feature to sort the Favorites.

Start the transaction using the WBSCM Portal path **Favorites > Organize Favorites > Portal Favorites** link. The Organize Favorites window displays.

1. Highlight the Favorite to rename.
2. Use the ✎ (the **Edit** icon) to change the name of a saved transaction.
3. Delete the name in the **New Name** field and type the desired name.
4. Click **Rename** (the **Rename** button).
5. The renamed Favorite displays in the Favorites list.

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WBSCM Home Page

Access a Favorite

Use the Favorites link to access a Favorite.

Start the transaction using the WBSCM Portal path: **Favorites** > [Transaction name].

1. Click the required Favorite for transaction to execute.
2. The transaction displays in the current browser window.

2023-AMS-00030-F 000071

Title	WBSCM Portal Navigation
Purpose	This job aid reviews advanced WBSCM Portal navigation. Refer to the WBSCM Portal Navigation video for basic WBSCM Portal navigation. This job aid reviews: • WBSCM Portal Screen Components o Access a Transaction via the Detailed Navigation Panel o Access a Transaction via the Search the Portal Field • Navigate within a Transaction o Matchcode Searches o Matchcodes with a Large List of Values o Search Using Attributes o Multiple Selection Criteria Searches o Create a Variant o Load a Variant • Transaction Output o Sort Columns o Sort Multiple Columns o Add / Remove Columns o Move Columns o Perform Calculations o Save a View o Apply a Saved View o Upload Document o Download / Export Document • WBSCM Help Options
Target Audience	All WBSCM Users
Access WBSCM	WBSCM is accessed via web browser. The WBSCM recommended browser is Chrome. To access WBSCM: 1. Open the web browser. 2. Enter the URL: https://portal.wbscm.usda.gov 3. Follow the prompts to login via USDA eAuthentication.

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WBSCM Portal Screen	WBSCM Portal Screen Components
	The components of the WBSCM Portal Screen are: 1. **Report Incident** link: Log incidents with the service desk. 2. **Search the Portal** field: Search for transactions instead of using the *Detailed Navigation Panel*. 3. **Level 1 Module Tabs**: Located directly below the Portal header, these provide the highest level of navigation. The tabs available depend on the user's security roles in WBSCM. The Level 1 *Home* tab is automatically selected upon logging in. 4. **Level 2 Tabs**: Located directly below the Level 1 tabs, these correspond to the Level 1 tab selection and user's security roles in WBSCM. The Level 2 *News and Alerts* tab is automatically selected upon login. 5. **Detailed Navigation Panel**: This section houses WBSCM transactions. Contents of this menu are dependent on the Level 2 tab selection and the user's security roles in WBSCM. **Note:** The *WBSCM Portal Home* Screen defaults with the *Detailed Navigation Panel* displayed. Users may adjust the amount of screen area used: • Click ◄ (the **Collapse Detailed Navigation Panel** button) to collapse the *Detailed Navigation Panel*. • Click ► (the **Expand Detailed Navigation Panel** button) to expand it. 6. **Content Area**: This area is used to enter or view details and execute transactions. **Note**: To maximize the size of the Content Area, click ◄ (the **Hide Navigator** button) to hide the Navigation Panel and/or click `Full Screen` (the **Full Screen** button).

WBSCM Detailed Navigation Panel	Access a Transaction via the Detailed Navigation Panel
	Transactions are used to perform a specific activity in WBSCM. Transactions are accessed by selecting the transaction from the *Detailed Navigation Panel*. 1. Select the Level 1 module tab for the required transaction. 2. Select the Level 2 tab for the required transaction. 3. Select the transaction from the *Detailed Navigation Panel*. 4. The initial screen of the transaction displays in the *Content Area*. **Tip:** Frequently used transactions can be saved to the user's personal favorites list. Refer to the WBSCM Portal Favorites job aid for more information.
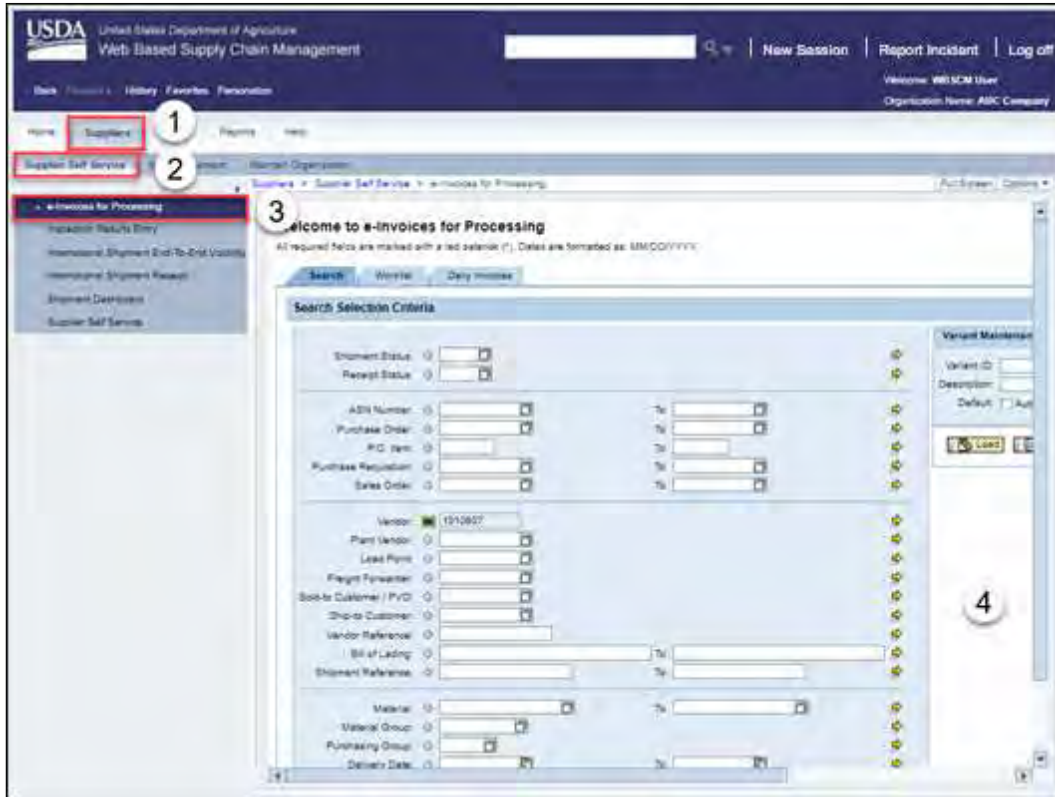
WBSCM Search the Portal Field Screen	Access a Transaction via the Search the Portal Field
	When the exact path to a transaction is not known, users may perform a search, which provides direct access to the transaction. 1. Enter a keyword or phrase in the **Search the Portal** field. 2. As characters are entered, a list of matching transactions displays. Select the transaction from the drop-down list. 3. The initial screen of the transaction displays in the *Content Area*. In this example, the *e-Invoices for Processing* screen displays. **Tip:** Frequently used transactions can be saved to the user's personal favorites list. Refer to the WBSCM Portal Favorites job aid for information.
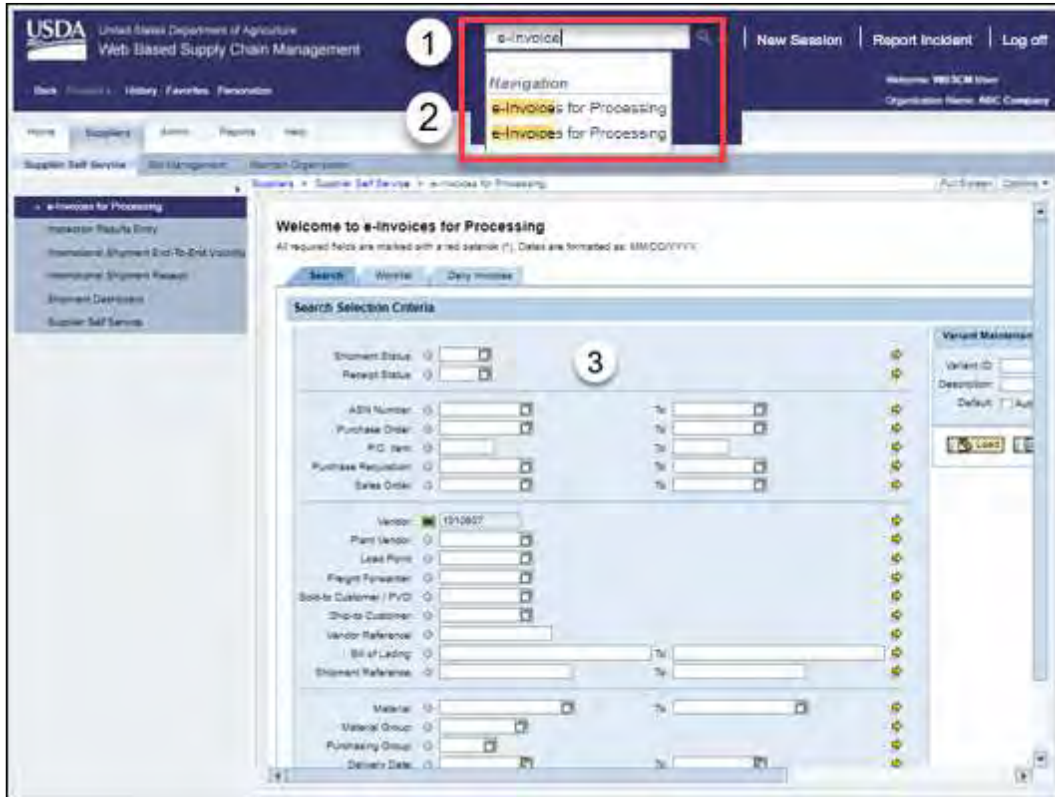
WBSCM Transaction Screen	Navigate within a Transaction
	1. **Transaction Navigation Path**: Displays above the *Content Area*.

WBSCM Transaction Screen

Navigate within a Transaction

1. **Transaction Navigation Path**: Displays above the *Content Area*.

2. **Transaction Name**: Displays at the top of the *Content Area*.

   In this example, the *e-Invoices for Processing* screen displays.

3. **Screen Tabs**: Contain one or more sub-screens.
   Note: Sub-screen tabs are transaction dependent and do not appear for all screens.

4. **Content Area**: Includes data entry and informational fields. There are three types of data entry fields:

   a. **Optional fields**: Fields that may be completed at the user's discretion or needed in a business process. Some transactions contain many optional fields and may be executed with any combination of known data in the available fields.

   b. **Default Data fields**: Fields that are prepopulated with data. The information in these fields is determined by WBSCM and cannot be changed.

   c. **Required fields**: Fields that must be completed to proceed with the transaction. Required fields are marked by an * before the field name.

Note: When entering search criteria, users should complete as many data entry fields as possible to limit the number of matching results. In some cases, there are additional tabs to review or update.

Matchcode Search Screen

Matchcode Searches

Matchcodes, also called a drop-down menu, allow the user to select from a list of possible values or to narrow a list of values to the required selection.

1. Select [ ] (the **Matchcode** button) to display a list of possible values.

   In this example, the user selects a value for the **Shipment Status** field.

2. Click [ ] (the **Select** button) to the left of the correct value.

3. Click [OK] (the **OK** button) to accept the selection.

4. The field is populated with the selected value.

Note: The user may select multiple values by holding the **CTRL** key and clicking

[ ] (the **Select** button) for each of the required lines.

Matchcode Search Screen

Matchcodes with a Large List of Values

For a long list of matchcode values, WBSCM prompts the user to further define the search criteria.

1. Select [icon] (the **Matchcode** button) to display the *Search* window.

   In this example, the **Material** field match code is selected.

2. Enter search criteria for the matchcode list:
   a. Select the search option from the drop-down in the first column.

      In this example, **Material description** is selected.

   b. Select a match type in the second column.

      In this example, **contains** is selected.

   c. Enter the search criteria in the third column.

      In this example, **BEEF** is entered.

3. Click [Search] (the **Search** button) to display a list of possible values.

4. Click [icon] (the **Select** button) to the left of the correct value.

   In this example, **BABY FOOD BEEF JAR 12/4 OZ** (Material # 900015) is selected.

5. The **Material** field is populated with the selected value.

Input Criteria Screen	Search Using Attributes

Input Criteria Screen
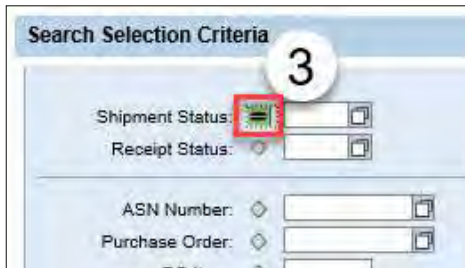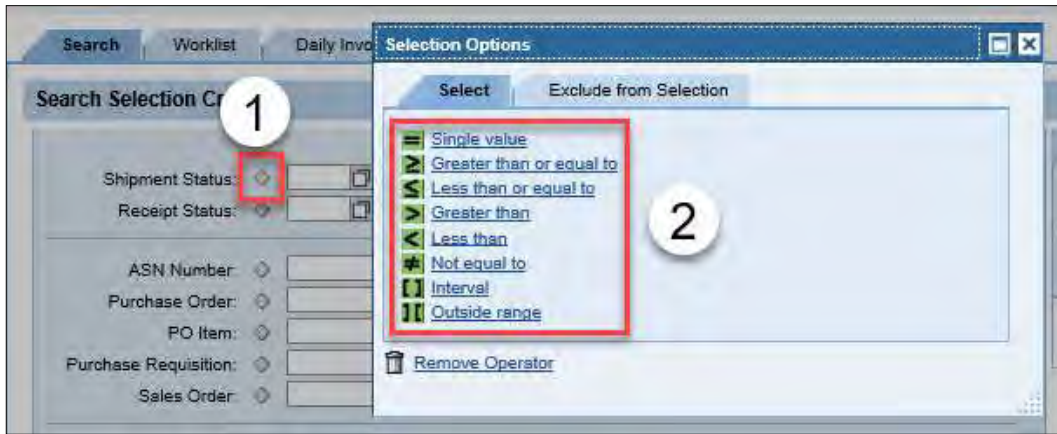
Search Using Attributes

By default, WBSCM will return records based on either a single value match or a range if beginning and ending values are entered (e.g., dates). Use ◇ (the **Attribute** button) to choose how to select records based on the entered value.

To change the selection option:

1. Click ◇ (the **Attribute** button) to the left of a field to open the *Selection Options* window. The window defaults to the *Select* tab.

2. Click the hyperlink of the required selection option.

    In this example, ▦ (the **Single Value** option) is selected to find records equal to the entered value for the **Shipment Status** field.

    Note: Select 🗑 Remove Operator (the **Delete Selection** option) to clear the selection option from the field.

3. The selection option is displayed next to the field.

    In this example, ▦ (the **Single Value** option) displays next to the **Shipment Status** field.

Note: Alternatively, the user can search by identifying which values not to include by entering values on the *Exclude from Selection* tab.

Input Criteria Screen

Multiple Selection Criteria

Users can enter multiple discrete values, ranges, or a combination of values by using Advanced Options. Ranges are entered in a from/to format. Users may also specify non-consecutive ranges or exclude values using this option. This example uses a consecutive range.

1. Click ![icon] (the **Advanced Options** button) to open the *Multiple Selection* window.

   In this example, Advanced Options is selected for the **Delivery Date** field.

2. Enter the beginning (low) value for the range in the **From** field.

   In this example, **01/01/2020** is entered.

3. Enter the ending (high) value for the range in the **To** field.

   In this example, **12/31/2020** is entered.

4. Click ![OK] (the **OK** button) to return to the input screen.

5. Review the search criteria. Unless a range is specified, fields with multiple selection criteria are indicated by ![icon] (the **Advanced Options** button).

   In this example, the **Delivery Date** field is populated with a range of dates entered in the *Multiple Selection* window.

Note: The operator symbol for the Attribute is updated based on the first line of the Multiple Selection. This is usually ![=] (the **Equal to** icon) for discrete values or ![between] (the **Between** icon) for intervals.

Input Criteria Screen

Create a Variant

Users can save frequently used search criteria as variants.

Note: Some screens automatically display the *Variant Maintenance* section. If not displayed, select the **Show Variants** link first.

1. Enter applicable search criteria in the input screen.

2. Enter the unique name and description for this set of search criteria in the **Variant** field and **Description** field, respectively.

3. Click (the **Save** button) to save the variant.

4. WBSCM displays a message *"The variant XYZ was successfully saved."* where XYZ represents the variant name.

Input Criteria Screen

Load a Variant

Note: Some screens automatically display the *Variant Maintenance* section. If not displayed, select the **Show Variants** link first.

1. Search for available variants using keywords by using ⬚ (the **Matchcode** button) in the **Variant ID** field. Refer to the Matchcode Searches section for more information.

   Note: If the exact variant name is known, the user may enter it directly in the **Variant ID** field. The **Description** field is automatically populated based upon the selected variant.

2. Click [Load] (the **Load Variant** button) to apply the saved search criteria from the variant.

Transaction Output Screen

Transaction Output

The transaction output screen displays the results based on the data entered on the input screen and the transaction performed.

Note: On screens with a tabular view, the output data displays on a different tab. For example, in the **e-Invoices for Processing** transaction, results are displayed on the *Worklist* tab. Not all screens include a tabular view.

The standard features of the output screen may include:

1. **Screen Name**: The name of the transaction.

2. **View**: The data layout applied to the output. The user may select the drop-down to change the view. Refer to the Apply a Saved View section for more information.
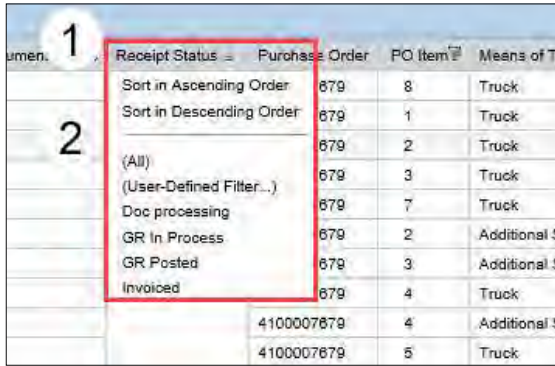
   One or more view options are available for each transaction. These may include:
   - **Standard View:** List of all fields that are available
   - **Default View**: Subset of most relevant fields
   - **Other system views**: Subset of fields and display layout for common purpose for specific report and/or user group. Multiple system views may be available for a given table.

3. **Column Headers**: Correspond to field names.

4. **Records**: Displayed as individual rows, with values for each field entered in the applicable columns.

5. **Scroll Bar**: Use to scroll left and right within the output screen to view additional data.

Transaction Output Screen

Sort Columns

When output is displayed in columns, they can be sorted and filtered to organize information.

1. Click on the column header to open a drop-down selection window.

2. Select from the available choices:
   - **Sort in Ascending Order**: Sorts from smallest to largest number or alphabetically (A to Z).
   - **Sort in Descending Order**: Sorts from largest to smallest number or in reverse alphabetical order (Z to A).
   - **All**: Displays all available data for the column.
   - **User-Defined Filter**: Opens the *Select Filter* window, which allows the user to define sort parameters.
   - **Single Value**: Sorts the results to only display the value chosen from the drop-down menu.

Note: If the **User-Defined Filter** or **Single Value** is selected, ![filter icon] (the **Filter** icon) displays in the corresponding column header.

Transaction Output Screen

Sort Multiple Columns

Users can apply multiple filters to organize data by using the sort feature located in the *Settings Dialog* window.

1. Click ▸ (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

    Note: If necessary, scroll right to display the **Open Settings Dialog** button.

2. In the expanded *Settings* window, select the **Sort** sub-tab.
    *   The **Unsorted Columns** table lists available columns that are not currently used to sort the view.
    *   The **Sorted Columns** table lists columns that are sorted in the view.

3. To use a column for sorting, select the column name from the **Unsorted Columns** table on the left and click [Add ▸] (the **Add** button).

4. To stop sorting for a column, select the column name from the **Sorted Columns** table on the right and click [◂ Remove] (the **Remove** button).

5. For each of the **Sorted Columns**, select a **Sort Direction**. By default, columns are sorted in Ascending order.

6. Use [▾][⤓][▴][⤒] (the **Move Item** buttons) to move a column up or down on the list to the required position.

7. Choose an action:
    *   To sort the data, click [OK] (the **OK** button).
    *   To exit without saving the changes, click [Cancel] (the **Cancel** button).
    *   To preview changes, click [Apply] (the **Apply** button).
    *   To restore all original settings, click [Reset] (the **Reset** button).

Transaction Output Screen

Add / Remove Columns

The user can add or remove columns on the screen.

1. Click [icon] (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

   Note: If necessary, scroll right to display the **Open Settings Dialog** button.

2. In the expanded *Settings* window, select the **Column Selection** tab.
   - The **Hidden Columns** table lists available columns that are not currently displayed in the view.
   - The **Displayed Columns** table lists columns that are currently included in the view.

3. To add a column to the screen, select the column name from the **Hidden Columns** table and click [Add] (the **Add** button).

4. To remove a column from the screen, select the column name from the **Displayed Columns** table and click [Remove] (the **Remove** button).

5. Choose an action:
   - To add or remove selected column(s), click [OK] (the **OK** button).
   - To exit without saving the changes, click [Cancel] (the **Cancel** button).
   - To preview changes, click [Apply] (the **Apply** button).
   - To restore all original settings, click [Reset] (the **Reset** button).

Transaction Output Screen

Move Columns

In the output table, users can drag and drop columns to change the order in which they display. Alternatively, users can view and modify the position of columns from the *Settings* window.

1. Click [icon] (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

   Note: If necessary, scroll right to display the **Open Settings Dialog** button.

2. In the expanded *Settings* window, select the **Column Selection** tab.

3. The **Displayed Columns** table indicates the order in which columns are displayed, left-to-right, on the screen.

4. Click [ ] (the **Select** button) to the left of a column name to select it.

5. Use [icons] (the **Move Item** buttons) to move the selected column(s) up or down on the list to the required position. Use the single arrow to move the column up or down one position. Use the double arrow to move the column to the top or bottom of the list.

6. Choose an action:
   - To change the order of the column(s), click [OK] (the **OK** button).
   - To exit without saving the changes, click [Cancel] (the **Cancel** button).
   - To preview changes, click [Apply] (the **Apply** button).
   - To restore all original settings, click [Reset] (the **Reset** button).

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Transaction Output Screen

Update the Display

Users can change the appearance of the output through the *Display* tab in the *Settings* window. To optimize how the content area displays columns and rows, the view can be customized to display 15 rows and 8 columns. See below for details.

1. Click [icon] (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

   Note: If necessary, scroll right to display the **Open Settings Dialog** button.

2. Select the *Display* tab.

3. The following display options are available for selection:
   - **Displayed Rows**: Indicates the number of rows to be displayed on the screen at once. This does not impact the number of rows in the output; to view additional rows use the vertical scrollbar. Recommended setting is **15**.
   - **Displayed Columns**: Indicates the number of columns to be displayed on the screen at once. This does not impact the number of columns in the output; to view additional columns, use the horizontal scrollbar. Recommended setting is **8**.
   - **Table Design**: Indicates the shading used in the table. Options include **Alternating** (transparent/tinted), **Standard** (all tinted), and **Transparent**. **Standard** is the default selection.
   - **Grid Lines**: Visible borders within the table. Options include **All**, **None**, **Vertically**, or **Horizontally**.

4. Choose an action:
   - To change the display preference(s), click [OK] (the **OK** button).
   - To exit without saving the changes, click [Cancel] (the **Cancel** button).
   - To preview changes, click [Apply] (the **Apply** button).
   - To restore all original settings, click [Reset] (the **Reset** button).

Transaction Output Screen

Perform Calculations

Users can include calculations for columns that include numeric values through the *Calculation* tab in the *Settings* window.

1. Click [icon] (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

   Note: If necessary, scroll right to display the **Open Settings Dialog** button.

2. Select the *Calculation* tab.

3. For any of the listed **Columns**, select a calculation type from the drop-down in the **Calculation** column. The following options are available:
   - **None**: No calculations are performed for this column.
   - **Total**: Displays the sum total for all line items in this column.
   - **Minimum**: Displays the lowest value in this column.
   - **Maximum**: Displays the highest value in this column.
   - **Mean Value**: Displays the average value for this column.

4. The following display options are available for selection. Users may select one, multiple, or none:
   - **Display Calculations at Start of Table:** Displays calculations at the top of the table for the selected columns.
   - **Display Preliminary Result**: Includes subtotal calculations for each of the selected columns.
   - **Collapse to Intermediate Results**: Displays only the totals for each of the selected columns.

5. Choose an action:
   - To change the display preference(s), click [OK] (the **OK** button).
   - To exit without saving the changes, click [Cancel] (the **Cancel** button).
   - To preview changes, click [Apply] (the **Apply** button).
   - To restore all original settings, click [Reset] (the **Reset** button).

Transaction Output Screen

Save a View

Users can save their customized layout for each screen with a *View* area. Saved views are only available to the user who created them.

1. Click [icon] (the **Open Settings Dialog** button) in the upper right-hand corner of the screen to display the *Settings* window.

   Note: If necessary, scroll right to display the **Open Settings Dialog** button.

2. Customize the view as needed:
   - Apply a Saved View
   - Add / Remove Columns
   - Move Columns
   - Sort Columns
   - Sort Multiple Columns
   - Update the Display

3. To save the layout for future use, click [Save as...] (the **Save As** button).

4. The *Save View As* window displays. Enter a description of the view in the **Description** field.

   Note: Select the **Initial View** checkbox to indicate that the saved view is to be the initial view.

5. Click [OK] (the **OK** button) to save or [Cancel] (the **Cancel** button) to exit without saving.
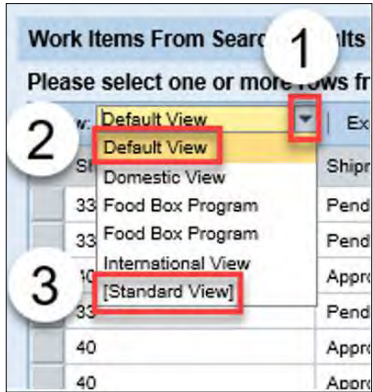
Transaction Output Screen	**Apply a Saved View**
	When data is displayed on an output screen, it defaults to the most recent layout view. In addition to any WBSCM-defined views (Standard, Default, etc.), each user may use their own saved views. Users can select from available views to change the information that is included and how it is displayed based on their needs. 1. Select the **View** drop-down list. 2. The current view is shown as highlighted. 3. Select a different view from the current view on the list. The view is automatically applied to the output.

Document Upload Screen
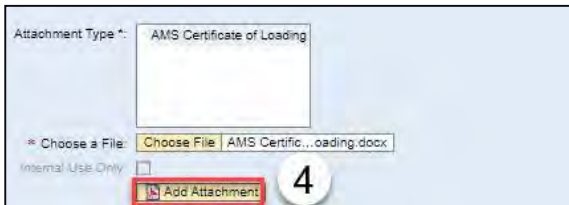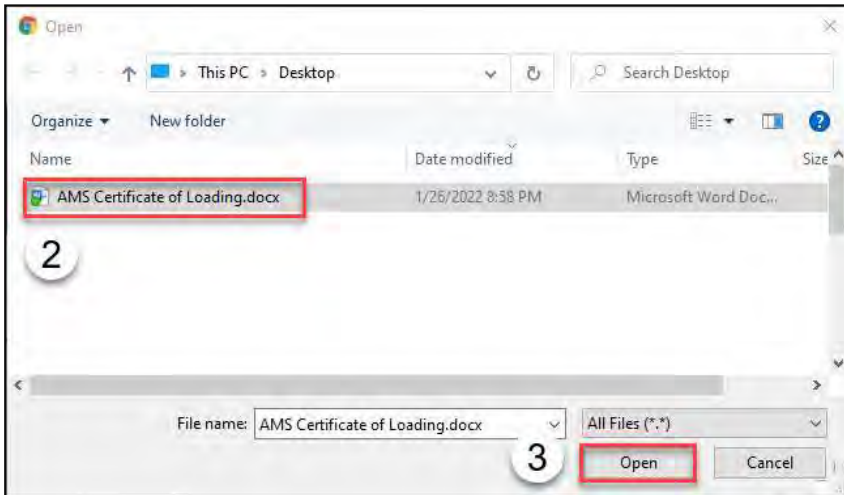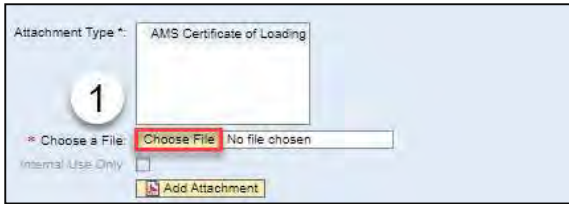
Upload Document

To upload a document, navigate to the appropriate WBSCM transaction. In this example, the **e-Invoices for Processing** transaction is selected.

1. Click [Choose File] (the **Choose file** button).

2. Locate and select the appropriate file to upload.

   In this example, the **AMS Certificate of Loading** file is selected.

   Note: Ensure the file to be uploaded is in the required format

3. Click [Open] (the **Open** button).

4. Click the upload button. The button name will vary based on the transaction.

   In this example, click [Add Attachment] (the **Add Attachment** button).

   Notes: Some transactions require additional steps to finalize the upload.

   If the upload fails due to an **HTML tags found in PDF** error, perform the following to resolve:
   - Open the PDF document in Adobe Reader.
   - Print with the **Microsoft Print to PDF** option.
   - Click the **Print** button. A new PDF document is created.
   - Save the new PDF and upload to WBSCM.

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Document Download Screen	Download / Export Document
	To download or export a document, navigate to the appropriate WBSCM transaction. In this example, the **e-Invoices for Processing** transaction is selected.
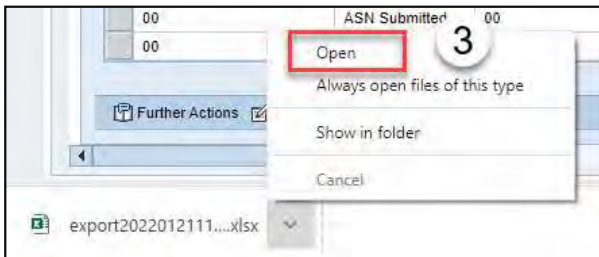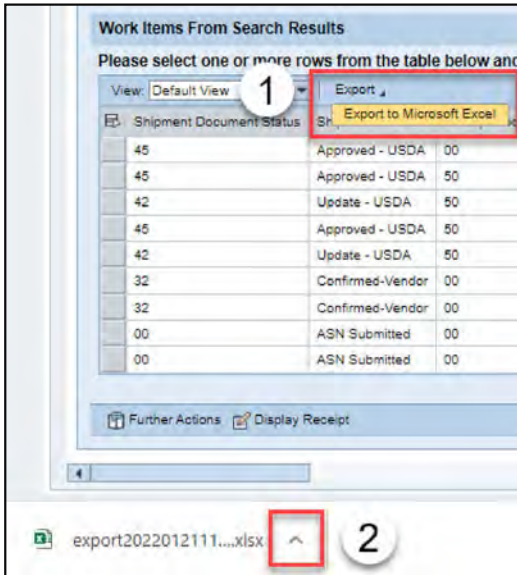
Download / Export Document

To download or export a document, navigate to the appropriate WBSCM transaction. In this example, the **e-Invoices for Processing** transaction is selected.

1. Click the download button. The button name will vary based on the transaction.

   In this example, click [Export] (the **Export** button) and select **Export to Microsoft Excel** from the drop-down.

   Note: A file download prompt displays at the bottom of the screen for all document types except PDF files.

2. Click ^ (the **Arrow** button) to display a list of options.

3. Click Open (the **Open** option).

   Note: The user can select the **Always open files of this type** option to set as the default option.

   Note: The file opens in a new window. Return to the browser to continue using WBSCM.

   Note: PDF documents automatically open on a browser preview tab in Chrome. The user may update their browser settings to enable PDF file downloads and change the default PDF viewer. Refer to the WBSCM Browser Settings and Helpful Tips Job Aid for additional details.

Context Sensitive Help Screen
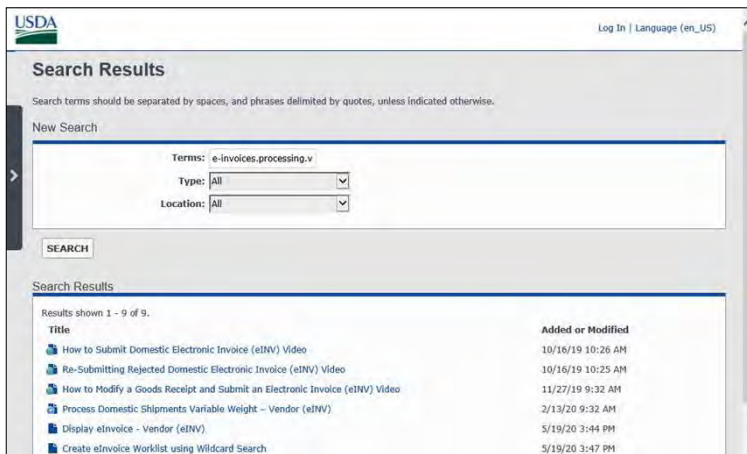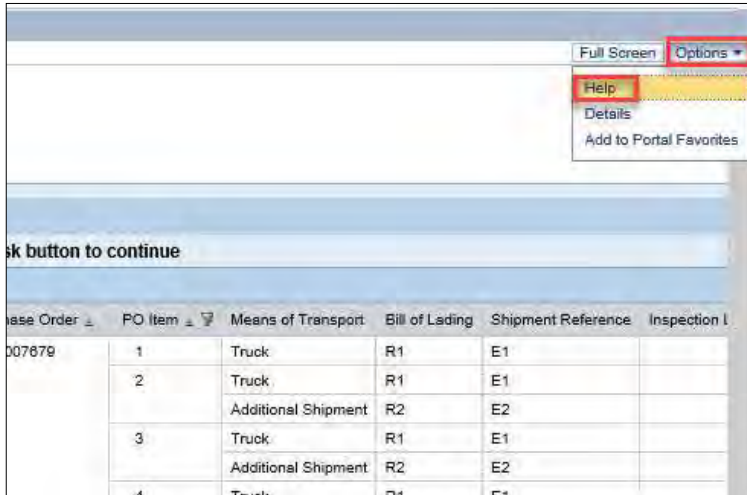
WBSCM Help Options

Related Help documents can be accessed directly from within the transaction. This is referred to as context sensitive help. To access context sensitive help, follow the path **Options ➔ Help** in a transaction. If multiple Help documents for the transaction exist, a list of choices will display.

WBSCM Help documents are available in several formats:

- **Work Instructions** (default): Detailed step-by-step instructions, which include transaction details, screenshots, notes, and field definitions. Work instructions are available in PDF or Word format.
- **Quick References**: Summarized step-by-step instructions, which include transaction details, but do not include screenshots or field definitions. Quick references are available in PDF or Word format.
- **Simulation (HTML)**: An interactive simulation of the transaction. Select Auto Playback Tutorial to watch the transaction steps. Select Standard Tutorial for hands-on interaction with the transaction steps.
- **Job Aids**: Quick reference documents that provide guidance for reports, general navigation and user preference tips, and miscellaneous references such as process flows and key terms.

For additional information refer to the WBSCM Help Documentation job aid.

Service Desk

WBSCM Service Desk Contact Information:

877-WBSCM-4U or 877-927-2648

8:00am – 6:00pm ET Monday-Friday (excluding holidays)

Email: WBSCM.servicedesk@CACI.com

Admin Type	User Being Modified	List of Roles available for assignment
AMS User Admin	AMS Internal	BI Reporting – AMS
AMS User Admin	AMS Internal	BI Viewer - AMS
AMS User Admin	AMS Internal	Complaint Specialist – AMS
AMS User Admin	AMS Internal	Contracting Officer – AMS
AMS User Admin	AMS Internal	COR – AMS
AMS User Admin	AMS Internal	Dom Loss/Damage Approve/Post – AMS
AMS User Admin	AMS Internal	Dom Loss/Damage Create/Edit – AMS
AMS User Admin	AMS Internal	Finance Scorecard – AMS
AMS User Admin	AMS Internal	FPAC Interface Log View- AMS
AMS User Admin	AMS Internal	Fulfilment Scorecard – AMS
AMS User Admin	AMS Internal	Fund Accountant – AMS
AMS User Admin	AMS Internal	Helpdesk – AMS
AMS User Admin	AMS Internal	Invoice Approver – AMS
AMS User Admin	AMS Internal	Invoice Approver – FSA DOM
AMS User Admin	AMS Internal	Material Master Admin – AMS
AMS User Admin	AMS Internal	Order Manager – AMS
AMS User Admin	AMS Internal	Org Admin – AMS
AMS User Admin	AMS Internal	Payment Adjustment Admin
AMS User Admin	AMS Internal	PO Admin - AMS
AMS User Admin	AMS Internal	Procurement Scorecard – AMS
AMS User Admin	AMS Internal	Recall Specialist – AMS
AMS User Admin	AMS Internal	Technician – AMS
AMS User Admin	AMS Internal	USDA Vendor Org Admin – AMS
AMS User Admin	AMS Internal	User Administrator – AMS
AMS User Admin	AMS Internal	SAC Analyst - AMS
AMS User Admin	AMS Internal	SAC Author - AMS
AMS User Admin	AMS Internal	Sourcing Specialist - Pilot
AMS User Admin	AMS Internal	View Only -AMS
AMS User Admin	AMS Internal	Planner Forecast Manager - AMS
AMS User Admin	AMS Internal	Planner - Approver - AMS
AMS User Admin	AMS Internal	Planner - AMS Specialist
AMS User Admin	AMS Internal	Planner Planning Analyst - AMS
AMS User Admin	AMS Internal	Planner View Only - AMS
Co-Op User Admin	COOP	Order Manager - CO-OP
Co-Op User Admin	COOP	Org Admin - Co-Op
Co-Op User Admin	COOP	User Admin - Co-op
Co-Op User Admin	COOP	View-Only - Co-op
FNS Org Admin	HQ	Org Admin - HQ
FNS Org Admin	HQ	User Admin - HQ
FNS Org Admin	HQ	View-Only - HQ
FNS Org Admin	NW	Org Admin - NW
FNS Org Admin	NW	User Admin - NW
FNS Org Admin	NW	View-Only - NW
FNS Org Admin	SDA/ITO	Complaint Specialist - SDA/ITO
FNS Org Admin	SDA/ITO	Order Manager - SDA/ITO
FNS Org Admin	SDA/ITO	Org Admin - SDA/ITO
FNS Org Admin	SDA/ITO	Recall Contact - External
FNS Org Admin	SDA/ITO	Recall Specialist - SDA/ITO
FNS Org Admin	SDA/ITO	User Admin - SDA/ITO
FNS Org Admin	SDA/ITO	View-Only - SDA/ITO
FNS Org Admin	Ship-to	Org Admin - Domestic Ship-to
FNS Org Admin	Ship-to	User Admin - Domestic Ship-To

Admin Type	User Being Modified	List of Roles available for assignment
FNS Org Admin	Ship-to	View-Only - Domestic Ship-to
FNS Org Admin	Third party Barter	Org Admin - Third-Party Barter
FNS Org Admin	Third party Barter	User Admin - Third-Party Barter
FNS Org Admin	Third party Barter	View-Only - Third-Party Barter
FNS Org Admin	Processor	Org Admin - Processor
FNS Org Admin	Processor HQ	Org Admin - Processor HQ
FNS User Admin	FNS Internal	BI Analyst - FNS
FNS User Admin	FNS Internal	BI Author - FNS
FNS User Admin	FNS Internal	BI Reporting – FNS
FNS User Admin	FNS Internal	BI Viewer - FNS
FNS User Admin	FNS Internal	BI Writeback Greensheets-FNS
FNS User Admin	FNS Internal	BI Writeback Purchase Plan-FNS
FNS User Admin	FNS Internal	Complaint Specialist – FNS
FNS User Admin	FNS Internal	Entitlement Manager - FNS
FNS User Admin	FNS Internal	FPAC Interface Log Viewer - FNS
FNS User Admin	FNS Internal	Finance Scorecard – FNS
FNS User Admin	FNS Internal	Fulfillment Scorecard – FNS
FNS User Admin	FNS Internal	Fund Accountant – FNS
FNS User Admin	FNS Internal	Helpdesk – FNS
FNS User Admin	FNS Internal	Inventory Management Specialist – NW
FNS User Admin	FNS Internal	Invoice Approver – FNS
FNS User Admin	FNS Internal	Material MASTER Admin – FNS
FNS User Admin	FNS Internal	Order Manager – FNS
FNS User Admin	FNS Internal	Order Manager MSD – FNS
FNS User Admin	FNS Internal	Order Manager Processing - FNS
FNS User Admin	FNS Internal	Org Admin – FNS
FNS User Admin	FNS Internal	PO Approver – FNS
FNS User Admin	FNS Internal	PO Processor – FNS
FNS User Admin	FNS Internal	Processing Specialist - FNS
FNS User Admin	FNS Internal	Procurement Scorecard – FNS
FNS User Admin	FNS Internal	Recall Contact – Internal
FNS User Admin	FNS Internal	Recall Specialist – FNS
FNS User Admin	FNS Internal	Recall Specialist – FNS – Notifications
FNS User Admin	FNS Internal	Report Viewer – FPRS
FNS User Admin	FNS Internal	Report Viewer – NDB
FNS User Admin	FNS Internal	SAC Analyst - FNS
FNS User Admin	FNS Internal	SAC Author - FNS
FNS User Admin	FNS Internal	User Administrator – FNS
FNS User Admin	FNS Internal	View Only - FNS
FNS User Admin	FNS Internal	Planner Forecast Manager - FNS
FNS User Admin	FNS Internal	Planner - Approver - FNS
FNS User Admin	FNS Internal	Planner Planning Analyst - FNS
FNS User Admin	FNS Internal	Planner View Only - FNS
FSA Org Admin	FAS	Agreement Obligation Approver - FAS
FSA Org Admin	FAS	BI Analyst - FAS
FSA Org Admin	FAS	BI Author - FAS
FSA Org Admin	FAS	BI Greensheet - FAS
FSA Org Admin	FAS	BI Purchase Plan - FAS
FSA Org Admin	FAS	BI Reporting - FAS
FSA Org Admin	FAS	BI Viewer - FAS
FSA Org Admin	FAS	Complaint Specialist - FAS
FSA Org Admin	FAS	Contracting Officer - FAS

Admin Type	User Being Modified	List of Roles available for assignment
FSA Org Admin	FAS	COR - Freight - FAS
FSA Org Admin	FAS	COR - Service - FAS
FSA Org Admin	FAS	FI Invoice Approver - FAS
FSA Org Admin	FAS	FI Invoice Processor - FAS
FSA Org Admin	FAS	Fund Accountant - FAS Post
FSA Org Admin	FAS	Fund Accountant - FAS Prepost
FSA Org Admin	FAS	Intl Loss/Damage Approve/Post - FAS
FSA Org Admin	FAS	Intl Loss/Damage Create Edit - FAS
FSA Org Admin	FAS	Invoice Approver - FAS
FSA Org Admin	FAS	Order Manager - FAS
FSA Org Admin	FAS	Receivables Processor – FAS
FSA Org Admin	FAS	SAC Analyst - FAS
FSA Org Admin	FAS	SAC Author - FAS
FSA Org Admin	FAS	View Only – FAS
FSA Org Admin	Freight forwarder	Freight Forwarder
FSA Org Admin	Freight forwarder	View-Only - Intl - FF
FSA Org Admin	Port Authority	Port Representative
FSA Org Admin	PS Warehouse	Org Admin - PS
FSA Org Admin	PS Warehouse	User Admin - PS
FSA Org Admin	PS Warehouse	View-Only – PS
FSA Org Admin	PVO	Complaint Specialist - PVO
FSA Org Admin	PVO	Order Manager - PVO
FSA Org Admin	PVO	Transportation Specialist - PVO
FSA Org Admin	PVO	View-Only - Intl - PVO
FSA Org Admin	Stevedore/Transloader	Stevedore
FSA Org Admin	Stevedore/Transloader	Stevedore_POC
FSA Org Admin	Surveyor	Surveyor
FSA Org Admin	VLO	VLO
FSA Org Admin	USAID	AOTR – USAID
FSA Org Admin	USAID	BI Analyst - USAID
FSA Org Admin	USAID	BI Author - USAID
FSA Org Admin	USAID	BI Greensheet - USAID
FSA Org Admin	USAID	BI Purchase Plan - USAID
FSA Org Admin	USAID	BI Reporting - USAID
FSA Org Admin	USAID	BI Viewer - USAID
FSA Org Admin	USAID	Complaint Specialist - USAID
FSA Org Admin	USAID	Order Manager - USAID
FSA Org Admin	USAID	PR Approver - USAID
FSA Org Admin	USAID	Specialist - Freight – USAID
FSA Org Admin	USAID	SAC Analyst - USAID
FSA Org Admin	USAID	SAC Author - USAID
FSA Org Admin	USAID	View Only - USAID
FSA Org Admin	USAID	Display Only-USAID
FSA User Admin	FSA Internal	BI Analyst - FSA
FSA User Admin	FSA Internal	BI Author - FSA
FSA User Admin	FSA Internal	BI Greensheet - FSA
FSA User Admin	FSA Internal	BI Purchase Plan - FSA
FSA User Admin	FSA Internal	BI Reporting – FSA
FSA User Admin	FSA Internal	BI Viewer - FSA
FSA User Admin	FSA Internal	CCC Operations CO – FSA
FSA User Admin	FSA Internal	CCC Operations Support – FSA
FSA User Admin	FSA Internal	Complaint Specialist – FSA

Admin Type	User Being Modified	List of Roles available for assignment
FSA User Admin	FSA Internal	Contracting Officer – Domestic – FSA
FSA User Admin	FSA Internal	Contracting Officer – International – FSA
FSA User Admin	FSA Internal	Contracting Officer – Traffic – FSA
FSA User Admin	FSA Internal	COR – Domestic – FSA
FSA User Admin	FSA Internal	COR – International – FSA
FSA User Admin	FSA Internal	COR – Traffic – FSA
FSA User Admin	FSA Internal	Dom Loss/Damage Approve/Post – FSA
FSA User Admin	FSA Internal	Dom Loss/Damage Create/Edit – FSA
FSA User Admin	FSA Internal	FPAC Interface Log View- FSA
FSA User Admin	FSA Internal	Finance Scorecard – FSA
FSA User Admin	FSA Internal	Fulfilment Scorecard – FSA
FSA User Admin	FSA Internal	Fund Approver – FSA
FSA User Admin	FSA Internal	Helpdesk - FSA
FSA User Admin	FSA Internal	Intl Loss/Damage Approve/Post
FSA User Admin	FSA Internal	Intl Loss/Damage Create Edit
FSA User Admin	FSA Internal	Inventory Management Specialist – PS
FSA User Admin	FSA Internal	Invoice Approver – AMS
FSA User Admin	FSA Internal	Invoice Approver – FSA DOM
FSA User Admin	FSA Internal	Invoice Approver – FSA INTL
FSA User Admin	FSA Internal	Invoice Processor – FSA
FSA User Admin	FSA Internal	List of Invoices - ERS
FSA User Admin	FSA Internal	Material Master Admin – FSA
FSA User Admin	FSA Internal	Order Manager - FSA
FSA User Admin	FSA Internal	Org Admin - FSA
FSA User Admin	FSA Internal	Procurement Scorecard - FSA
FSA User Admin	FSA Internal	Recall Specialist – FSA
FSA User Admin	FSA Internal	Receivables Processor - FSA
FSA User Admin	FSA Internal	SAC Analyst - FSA
FSA User Admin	FSA Internal	SAC Author - FSA
FSA User Admin	FSA Internal	Solicitation Manager - FSA
FSA User Admin	FSA Internal	Technician - FSA
FSA User Admin	FSA Internal	USDA Vendor Org Admin - FSA
FSA User Admin	FSA Internal	User Administrator - FSA
FSA User Admin	FSA Internal	View Only - FSA
HQ User Admin	HQ	Org Admin - HQ
HQ User Admin	HQ	User Admin - HQ
HQ User Admin	HQ	View-Only - HQ
NW User Admin	NW	Org Admin - NW
NW User Admin	NW	User Admin - NW
NW User Admin	NW	View-Only - NW
RA User Admin	RA	Order Manager - RA
RA User Admin	RA	Org Admin - RA
RA User Admin	RA	User Admin - RA
RA User Admin	RA	View-Only - RA
SDA/ITO Org Admin	COOP	Order Manager - CO-OP
SDA/ITO Org Admin	COOP	Org Admin - Co-Op
SDA/ITO Org Admin	COOP	User Admin - Co-op
SDA/ITO Org Admin	COOP	View-Only - Co-op
SDA/ITO Org Admin	HQ	Org Admin - RA
SDA/ITO Org Admin	RA	Order Manager - RA
SDA/ITO Org Admin	RA	User Admin - RA
SDA/ITO Org Admin	RA	View-Only - RA

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Admin Type	User Being Modified	List of Roles available for assignment
SDA/ITO User Admin	SDA/ITO	Complaint Specialist - SDA/ITO
SDA/ITO User Admin	SDA/ITO	Order Manager - SDA/ITO
SDA/ITO User Admin	SDA/ITO	Org Admin - SDA/ITO
SDA/ITO User Admin	SDA/ITO	Recall Contact - External
SDA/ITO User Admin	SDA/ITO	Recall Specialist - SDA/ITO
SDA/ITO User Admin	SDA/ITO	User Admin - SDA/ITO
Ship-to User Admin	Ship-to	Org Admin - Domestic Ship-to
Ship-to User Admin	Ship-to	User Admin - Domestic Ship-To
Ship-to User Admin	Ship-to	View-Only - Domestic Ship-to
Third Party Barter User Admin	Third party Barter	Org Admin - Third-Party Barter
Third Party Barter User Admin	Third party Barter	User Admin - Third-Party Barter
Third Party Barter User Admin	Third party Barter	View-Only - Third-Party Barter
Vendor Admin	Vendor Org User	ASN Dispatcher-CVN

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This document is the official reference guide for WBSCM terms and acronyms. It is a compilation of terms, with brief descriptions, and acronyms, with full descriptive names, used in association with the operations and functionality of the WBSCM portal system. It includes the following common elements:

- Terms applicable at the WBSCM Program level
- WBSCM relevant organizations/entities/agencies
- Key WBSCM user groups
- Systems and tools that are part of the WBSCM system and program
- USDA food program acronyms

The acronyms and terms in this document are not an exhaustive list. For terms at the field, screen, and transaction levels, please reference the related training materials in the *Help* section of the WBSCM portal.

This is a living document that will be updated periodically, as required. The terms in this document are listed in alphabetical order. To navigate to a section, hold down the **Ctrl** key and click on one of the below underlined links.

Glossary Navigation Links (Alphabetical)

A	B	C	D	E	F	G	H	I	J	K	L	M
N	O	P	Q	R	S	T	U	V	W	X	Y	Z

Term/Acronym	Description
A	Back to Top
AA	Account Assignment
ACDA	American Commodity Distribution Association
ADA	Americans with Disabilities Act
AIS	Automated Inventory System
ALM	Application Lifecycle Management
AMS	Agricultural Marketing Service USDA agency that procures commodities for the domestic and international food aid programs and has responsibility for procuring foods, based on the agricultural markets it supports through its broader programs.
APHIS	Animal and Plant Health Inspection Service
ASN	Advance Shipping Notification
AVC	Availability Control
B	Back to Top
Batch	In WBSCM, Batch refers to a batch program or process that, once triggered, updates multiple transactional records at one time. Often the results are reflected in WBSCM reports.
BBB	Build Back Better Initiative
BEOS	Bid Evaluation and Optimization Solution
BI	Business Intelligence
BIUB	Best if Used By
BMI	Business Management Improvement
BOA	Basic Ordering Agreement
BoL	Bill of Lading The packing slip that accompanies an order sourced from a warehouse.
BoM	Bill of Materials

Term/Acronym	Description
BP	Business Partner In WBSCM, all organizations, including customer organizations, vendors, Ship-To locations, and external personnel of the national warehouses, are assigned a unique Business Partner number for tracking and processing; some alternative terms include Customer Number, Vendor Number, and Ship-To Location ID.
BW	Business Warehouse
C	Back to Top
CACFP	Child and Adult Care Food Program
CACI International Inc.	Primary contractor for the WBSCM Program
CARE	Cooperative for Assistance and Relief Everywhere
Catalog	A medium used for placing orders in WBSCM
CBO	Country Backstop Officer (International Ordering)
CCB	Change Control Board A WBSCM Governance body that must approve or disapprove all WBSCM solution changes, including software, document deliverables, and hardware recommended by the DRB.
CCC	Commodity Credit Corporation
CCR	Central Contractor Registration
CFAP	Coronavirus Food Assistance Program
ChaRM	Change Request Management
CN	Child Nutrition
CNOB	Child Nutrition Operations Branch
COA	Certificate of Analysis
COL	Certificate of Loading
Commodity	Standard food commodities that USDA purchases
COR	Contracting Officer Representative
COSUP	Covid Supplemental Assistance
CR	Change Request A WBSCM system change that is reviewed and approved by the project team Change Control Board for implementation.
CRM	Customer Relationship Management
CS	Case (See also UoM)
CSH	Context-Sensitive Help An on-screen help feature that provides, where available in the system, help resources and instructions specific to the current transaction.
CSA	Community Supported Agriculture
CSFP	Commodity Supplemental Food Program
CSR	Country Specific Requirements
CY	Calendar Year Represents the period of January 1 through December 31 of the same year. Programs such as TEFAP and CSFP use calendar year to track and report on orders, food assistance, and entitlement spending in WBSCM.
D	Back to Top
DA	Disaster Assistance
DATA Act	Digital Accountability and Transparency Act of 2014

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Term/Acronym	Description
Delivery Document	Internal document automatically generated when goods are issued (shipped) from a warehouse.
DF	Donated Foods
DLA	Defense Logistics Agency
DMS	Document Management System
DOD	Department of Defense
DOD Fresh	Department of Defense Fresh Fruit/Vegetable Program
DOE	Department of Energy
DOI	Department of Interior
Domestic Vendors	A group of Business Partners in WBSCM who provide commodities, freight, and services to the various USDA food programs within the United States.
Domestic Customers	A group of WBSCM users within the United States who receive commodities from the USDA food programs consisting of the following: SDAs, RAs, ITOs, Co-ops, Ship-Tos, and Warehouse Users.
Domestic Requisition	A precursor to a sales order; RAs and Co-ops create domestic requisitions to order goods in WBSCM.
DPM	Deputy Program Manager
DRB	Defect Review Board A WBSCM Governance body responsible for reviewing, validating, approving, and prioritizing WBSCM defects, enhancements, and incidents reported by the WBSCM user community.
DUNS	Dun & Bradstreet Numbering System
E	Back to Top
E2E	End-to-End Visibility (International Commodity Shipments)
eAuth	eAuthentication Authentication method used by USDA to protect various systems and applications including WBSCM. It provides users single sign-on access to the WBSCM Portal.
ECC	ERP Central Component
EDC	Encourage Domestic Consumption
EDI	Electronic Data Interchange
EDS	Electronic Data Systems
eFMS	Electronic Funds Management System
eINV	Electronic Invoicing
EIT	Electronic and Information Technology
Entitlement Dollars	The planned assistance level allocated to each Recipient Agency based on the previous year's meal counts.
ERP	Enterprise Resource Planning (e.g., SAP, Oracle)
F	Back to Top
FAS	Foreign Agricultural Service USDA agency that administers the foreign aid distribution programs.
FC	Funds Commitment
FDA	Food and Drug Administration
FDPIR	Food Distribution Program on Indian Reservations
FEDSIM	Federal Systems Integration and Management Center
FEMA	Federal Emergency Management Agency

Term/Acronym	Description
FFAVORS	Fresh Fruits and Vegetables Order Receipt System
FFFB	Farmers to Families Food Box
FFP/BHA	Food for Peace / Bureau for Humanitarian Assistance
FFVP	Fresh Fruit and Vegetable Program
Filter Criteria	A set of criteria used to define parameters for report results.
FIN	Finance WBSCM business processes that account for all financial accounting within WBSCM, funds and budget management, accounts receivable, invoicing and payments, year-end processing, and interface management for procurement and delivery of commodities in support of USDA food programs.
FIPS	Federal Information Processing Standards
FM	Funds Management
FMBB	Funds Management Budgeting Workbench
FMMI	Financial Management Modernization Initiative
FMMI-R	Financial Management Modernization Initiative – Readiness
FMNP	Farmer's Market Nutrition Program
FNS	Food and Nutrition Service USDA agency that receives funding for, and administers, domestic food distribution programs. This includes overall program and budget management, as well as all customer interactions.
FNSRO	FNS Regional Offices
FOIA	Freedom of Information Act
FPAC	Farm Production and Conservation
FPDS	Federal Procurement Data System
FPRS	Food Programs Reporting System
Freight	Corresponding freight requirement for each commodity
FSA	Farm Service Agency USDA agency that manages the financial reporting for the foreign aid distribution programs.
FSIS	Food Safety and Inspection Service
FSMC	Food Service Management Companies
FTL	Full-Truck Load
FTL Forum	A discussion board forum in WBSCM used by SDAs to coordinate and maintain full truckload requests.
FUL	Fulfillment WBSCM business processes related to capturing and forecasting customer demand, creating and managing the ordering process, and delivery and receipt of commodities in support of USDA food programs.
Functional Area	Master data maintained within the Funds Management module and used by Finance to classify revenues and expenditures by function.
FY	Fiscal Year Represents the period of October 1 of one calendar year to September 30 of the next year. WBSCM follows the standard Federal Government fiscal year period for all its financial year-end close activities.
G	Back to Top
GAL	Gallon (See also UoM)

Term/Acronym	Description
GIPSA	Grain Inspection, Packers, and Stockyards Administration
GMin	Guaranteed Minimums
Goods Issued	An action performed in the system by warehouse personnel when goods are sent to a customer. It decrements the inventory and generates a delivery document.
GR	Goods Receipt (also referred to as a Shipment Receipt in WBSCM)
GSA	General Services Administration
H	*Back to Top*
HANA	High-Performance Analytic Appliance
HH/HOB	Household Operations Branch
I	*Back to Top*
IDIQ	Indefinite Delivery, Indefinite Quantity
IDoc	Intermediate Document generated during exchange of data between WBSCM and its interfaces with other systems.
IFMS	Integrated Food Management System
Inspection Plan	Established at a material level, that defines the criteria for various material characteristics (e.g., moisture content, color, etc.), the acceptable ranges or values for each characteristic, and associated premiums or discounts, where applicable.
Inspection Results	Inspection of a commodity based on inspection plan criteria, which can include quantitative or qualitative inspection characteristics (e.g., moisture content and color).
International Transportation Providers	Groups in WBSCM that assist in the transportation of commodities overseas, including Freight agents, Freight Forwarders, and Stevedores.
International Vendors	A group of Business Partners in WBSCM that provide commodities, freight, and services to the various USDA food programs overseas.
Inventory Reconciliation	Reconciliation of inventory in WBSCM against the physical inventory in the warehouse to ensure quantities match.
IQF	Individually Quick Frozen
IR	Invoice Receipt
ITO	Indian Tribal Organization
J	*Back to Top*
JA	Job Aid A type of WBSCM training instructional document.
K	*Back to Top*
KM	Knowledge Management
L	*Back to Top*
LIQ	Liquidated Value Adjustments
LL	Lessons Learned
LOI	List of Invoices reports
LPN	Long Procurement Number An Agriculture Acquisition Regulation (AGAR) document numbering system.
LRP	Local and Regional Food Aid Procurement Program
M	*Back to Top*
MARAD	Maritime Administration
MARO	Mid-Atlantic Regional Office

Term/Acronym	Description
Master Data	Foundational data established in WBSCM and used by all functional modules for transactional processing, such as a customer number, material number, company code, sales org, plant, or storage location.
Matchcode Search	Search option that allows the user to select a value or values from a list of possible entries for a field.
Material Master	A storage area containing records for each material available in WBSCM.
Material or Product	For procurement purposes this is a commodity; for fulfilment purposes the reference is to a material or product.
ME	Management Evaluation
MOU	Mass Order Update
MPRO	Mountain Plains Regional Office
MRP IT	Marketing and Regulatory Programs Information Technology
MT	Metric Ton (See also UoM)
MWRO	Midwest Regional Office
N	Back to Top
NAFDPIR	National Association of Food Distribution Programs on Indian Reservations
NERO	Northeast Regional Office
NGO	Non-governmental Organization
NLT	No Later Than
NO	National Office
Non-Delivery Date	Dates when the customer does not want to receive deliveries.
NRRS	National Receipts and Receivables System
NSAB	Nutrition Services Access Branch
NSIP	Nutrition Services Incentive Programs
NSLP	National School Lunch Program
NW	National Warehouse
O	Back to Top
O&M	Operations and Maintenance
OCFO	Office of the Chief Financial Officer
OCIO	Office of the Chief Information Officer
OCM	Organizational Change Management
OCN	Order Change Notification
OFS	Office of Food Safety
OLTP Reports	Online Transaction Processing Reports that provide real-time information queried directly from the WBSCM system.
OMB	Office of Management and Budget
Order Management	The aspect of fulfillment business process that pertains to placing and managing orders.
P	Back to Top
PCA	Procurement Contract Award
PIMB	Policy, Integrity, and Monitoring Branch
PM	Program Manager
PMO	Program Management Office
PMT	Program Management Team
PNR	Problem Notification Report

Term/Acronym	Description
PO	Purchase Order The same as a Notice to Deliver and the old contract number in WBSCM. This refers to the order that AMS creates to signify that they are purchasing the goods from a vendor.
PoP	Period of Performance
PPA	Prompt Pay Act
PR	Purchase Requisition/Request
PRO	Procurement WBSCM business processes related to procurement of commodities in support of USDA food programs to include bids and solicitation management, awards processing, and establishing and managing procurement contracts.
Processing Diversion	Materials listed under the Processing Diversion section of the Product Catalog indicate USDA foods to be diverted to a Processor to be processed into end products.
Program/Functional Area	A funding source with a unique code that indicates one of the programs to which an SDA or RA belongs.
PVO	Private Voluntary Organization
Q	Back to Top
QM	Quality Management (International commodity inspections)
R	Back to Top
RA	Recipient Agency
RCN	Requisition Change Notification
Release Notes	WBSCM Release Notes summarize new or modified features and functions available in production through the monthly and quarterly releases.
Requested Delivery Date	The date the customer would like to receive deliveries.
Requisition	A requisition is an offer to request materials.
Role	Assigned to users per job description or requirements that allow or restrict access to business data or functions.
S	Back to Top
SAC	SAP Analytics Cloud
SAM	System for Award Management
SAP	Systems Applications and Products
SBP	School Breakfast Program
SCION	Specialty Crop Integrated Operating Network
SD	Sales and Distribution
SDA	State Distributing Agency
SDVOSB	Service-disabled Veteran-owned Small Business
SEPDS	Summary End Product Data Schedules
SERO	Southeast Regional Office
SFA	School Food Authority
SFMNP	Senior Farmer's Market Nutrition Program
SFSP	Summer Food Service Program
Ship-To Party (Ship-to Location)	The same as an Entity Code. It refers to the location where goods can be delivered. This is created by an Org Admin and assigned to the business partner. A business partner can have multiple ship-to locations.
SLA	Service Level Agreement

Term/Acronym	Description
SME	Subject Matter Expert
SNAP	Supplemental Nutrition Assistance Programs
SNAS	Supplemental Nutrition and Safety
SO	Sales Order Orders created by SDAs, ITOs, or FNS to indicate the sale of products. This document is created after domestic requisitions have been created, submitted, consolidated, and approved, and before the item goes to procurement for sourcing. This is done before the creation of a purchase requisition (PR).
Sold-To Party (Sold-to Location)	It refers to the primary Business Partner ID/Code and address of the organization placing the order (e.g., SDA, RA, or PVO/WFP).
SolMan	Solution Manager
Sourcing Method	Method for procuring goods, which could include direct delivery, processing, or multi-food.
SpAgency	"Sponsoring Agency," referring to AMS, FNS, USAID, or FAS
SRM	Supplier Relationship Management
SSO	Single Sign On
Standard Domestic Sales Order	A standard domestic sales order is created any time a ship-to or sold-to address is domestic (within the continental US).
SWRO	Southwest Regional Office
SY	School Year Represents the period from July 1 of one year to June 30 of the next year. Programs like NSLP and CACFP follow school year for placing orders and tracking entitlements.
T	Back to Top
TEFAP	The Emergency Food Assistance Program
TM	Trade Mitigation
TPOC	Technical Point of Contact
Transactional Data	Data entered or created in WBSCM when performing various business operational functions and identified by unique numbers, such as sales order number or delivery document number.
U	Back to Top
UEI	Unique Entity Identifier
UoM	Unit of Measure
USAID	United States Agency for International Development USDA agency that administers the foreign aid distribution programs.
USDA	United States Department of Agriculture
User(s)	Individuals granted WBSCM access with specific roles to perform business functions.
V	Back to Top
VAN	Value-Added Network
Variant	A variant is a saved set of parameters for running a report and is used when a report using the same default values is run frequently.
VLO	Vessel Loading Observer
VoIP	Voice over Internet Protocol
W	Back to Top
WBSCM	Web Based Supply Chain Management (System)

Term/Acronym	Description
WBSCM 3	Web Based Supply Chain Management (Contract #3)
WBSCM Portal	The web interface used for USDA fulfillment and procurement.
WCAG	Web Content Accessibility Guidelines
WFP	World Food Program
WI	Work Instruction A type of WBSCM training document with step-by-step instructions.
Workflow	Process of routing a document from one user to another for action and/or approval.
WRO	Western Regional Office

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WBSCM Upgrade Summary – March 2022

Effective March 14, 2022, the Web Based Supply Chain Management (WBSCM) system upgrade is complete and available to users. With this upgrade, WBSCM has also switched to Google Chrome as the recommended browser.

This upgrade brings all the core components of WBSCM to the currently available patch levels. This includes WBSCM enterprise core components, the customer and supplier components, the business intelligence reporting, as well as the Portal-based functions. This summary document provides end users with detailed information about the changes to the system resulting from the upgrade or the switch to Chrome. In addition, this document describes open issues at the time of deployment and related workarounds, where available.

To seamlessly access the WBSCM document links in this guide, first log into WBSCM.

Review a short WBSCM Portal Navigation Video Tutorial that provides an overview of the WBSCM portal navigation and help resources.

Review the WBSCM Upgrade and Switch to Chrome Release Notes for further information on all the changes.

Additionally, users can review a list of all recently updated training documents for step-by-step instructions.

The differences after the upgrade and with the browser switch are summarized below.

Overall Improvements
Global Changes
> **Chrome Browser Pop-up Settings**
> **WBSCM Output Tables**
> **Upload/Import**
> **Download/Export**
> **WBSCM Reports**
> **Concurrent User Logins**

Application Specific Updates
> **Vendor Registration Form**
> **Bid Invitation and Contracts Differences**
> **Order Entry Differences**
> **PrePo Purchase Requisition Differences**
> **Enter Shipment Receipt Differences**

Reports
> **Report Titles**
> **BI Entitlement Reports**
> **Order Processing and Status Reports**

Open Issues and Workarounds

Overall Improvements

With Chrome, special browser settings are no longer required for WBSCM. The only requirement is to enable pop-ups.

After the WBSCM upgrade, there is noticeable improvement in system performance in the areas of bid invitation, bid response, and reviewing and processing awards.

Usability and accessibility have been improved for select transactions and reports, most notably the onscreen tooltips and report descriptions.

Using Chrome, there is no longer a warning message when the user cuts and pastes text in WBSCM; users can browser, the user can also double-click to copy text.

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Global Changes

Chrome Browser Pop-up Settings

Pop-ups must be enabled for WBSCM to work properly. The user has two options for enabling pop-ups depending on the activities performed. The pop-ups can be enabled for all websites (global) or specifically for the WBSCM website.

To set up the pop-up preferences, perform the following steps:

1. Open (the **Chrome** browser).

2. Click (the **Three Dots** button) on the top right corner of the screen.

3. Click (the **Settings** button).

4. Click (the **Security and Privacy** button) on the left part of the screen.

5. Click (the **Site Settings** button).

6. If necessary, click (the **Drop-down** arrow) on the bottom right corner, to view additional options.

7. Click (the **Pop-ups and redirects** button).

8. The user can choose between clicking (the **Sites can send pop-ups and use redirects** radio button) to enable global pop-ups or

   leaving (the **Don't allow sites to send pop-ups or use redirects** radio button) enabled and adding only the WBSCM pop-ups.

Refer to the WBSCM Browser Settings and Helpful Tips Job Aid for more information about enabling Pop-up settings.

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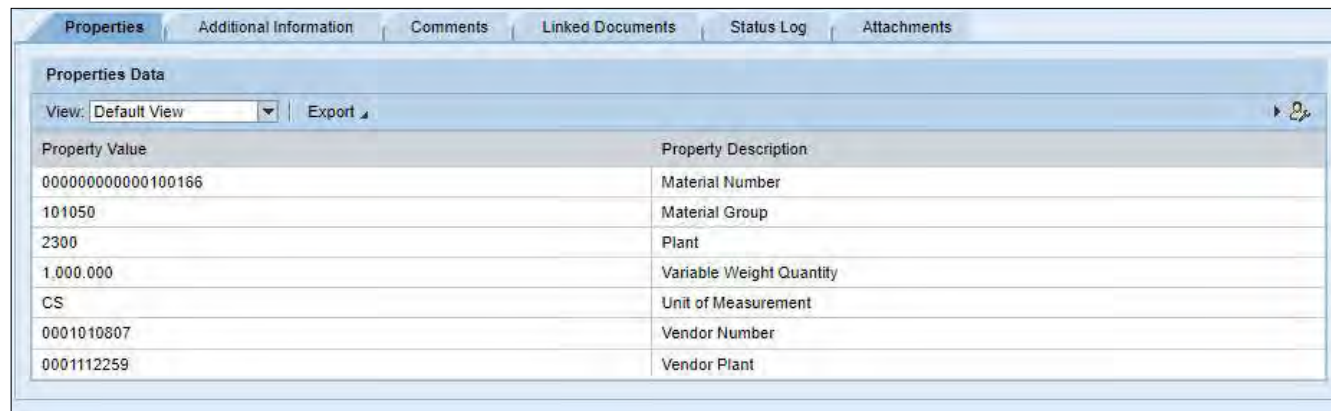
WBSCM Output Table

WBSCM output tables display data results based on selection criteria. After the upgrade, there are two noticeable differences:

1. The column widths are stretched to fit the screen. This is most obvious for tables with few columns as the user may see extra space in the table. Sometimes, the user may need to use the scrollbars to view all rows and columns. The WBSCM team is continuing to work with the software vendor (SAP) to determine a potential solution.
2. When a table is sorted, the cells containing the same value for adjacent rows are merged. If a row is selected that includes a merged cell, highlighting appears to include multiple rows for the column(s) with a merged cell.

The behavior described above is noticeable for all applications and reports in WBSCM that generate output tables such as **e-Invoices for Processing**, **Inventory Dashboard**, and **International Shipment End-To-End Visibility**.

The following is an example of a table with few columns that is stretched to fit the screen width:

In the example below, the **e-Invoices for Processing** transaction output table is sorted by **Pur. Doc** and the **P.O. Item**. In those columns, the cells in those columns that contain the same value in adjacent rows have been merged: **P.O. Item** of 10 is merged for two rows; **Pur. Doc.** of 4100012776 is merged for five rows. Although the user has selected only two rows, the highlighting includes the merged cell in the **Pur. Doc.** column, which applies to several additional rows.

The **Default View** for WBSCM output tables provides a subset of most relevant fields, while the **Standard View** displays a list of all fields that are available. Users can customize what information is included and how it is displayed through **Settings**. The recommended settings for the **Display** tab are **15 rows** and **8 columns** with **All Grid Lines**. Users can use the **Default** view or another non-Standard view to customize and then save their personal view.
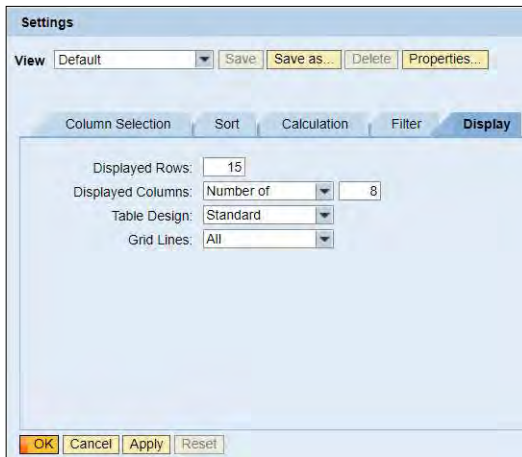
Refer to the WBSCM Portal Navigation Job Aid for more information about personalizing the table display.

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Upload/Import

There are minor differences, as shown below, when uploading or importing files in WBSCM using Chrome. To upload a document, navigate to the appropriate WBSCM transaction.

1. Click [Choose File] (the **Choose file** button).
2. Locate and select the appropriate file to upload.
3. Click the upload button. The button name will vary based on the transaction.

Before	After
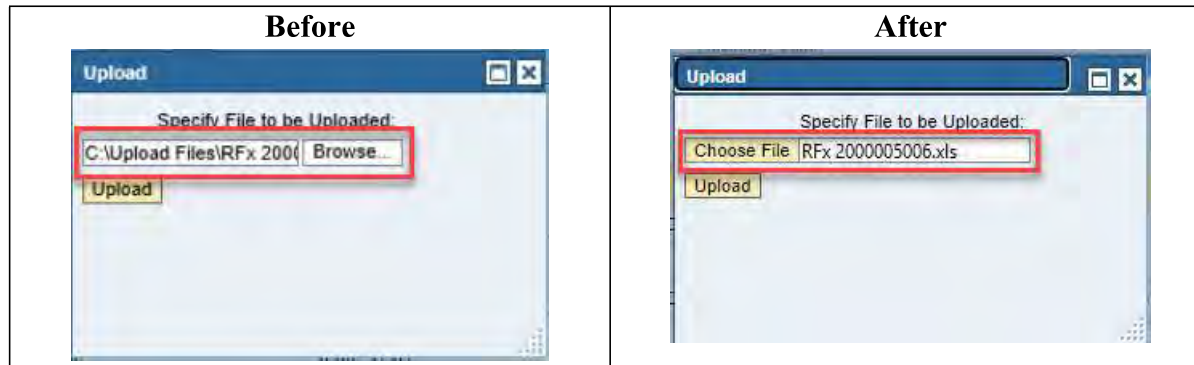
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Download/Export

In Chrome, there are multiple browser settings that affect the download behavior. <u>Some Chrome browser settings or features may not be available to all users</u>. If necessary, contact the organization's IT group for support.

First, check the Advanced Settings in Chrome for Downloads. If the **Ask where to save each file before downloading** is On, as shown in the picture, the user will be asked where to save the file for each download.
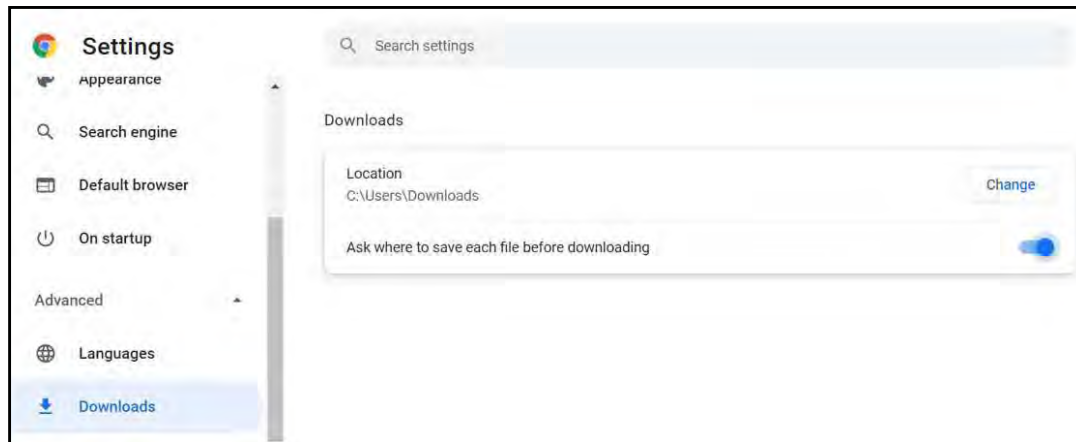
By default, Chrome will download the document and/or provide a download prompt with additional options. To download or export a WBSCM document such as a Microsoft Office document or a PDF file navigate to the appropriate WBSCM transaction and click the button for download.

For all types of documents except PDF, the first time the button is clicked, a file download prompt displays at the bottom of the screen. Perform the following steps to download:

1. Click ^ (the **Arrow** button).
2. Click Open (the **Open** option).

Select the **Always open files of this type** option to automatically open all files of this type in the future.
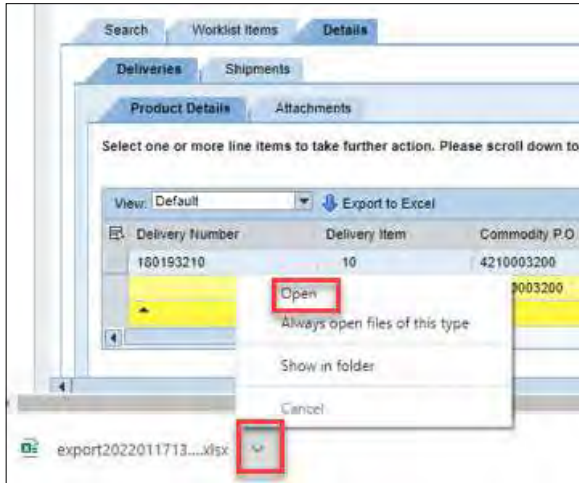
By default, PDF documents from WBSCM will open automatically in Chrome.

Refer to the WBSCM Browser Settings and Helpful Tips Job Aid for more information about enabling PDF download settings.

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WBSCM Reports

Several commonly used standard reports in WBSCM have been updated to address accessibility such as tooltips, ease of use, and consistent look and feel. More specifically, these reports now have a standardized header block with page title and a standardized set of buttons. Users can view a brief description of a report by moving the cursor over 🛈 (the **Information Icon**) at the top of the screen. This description can also be found in the custom PDF output files.

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Concurrent User Logins

Chrome does not support concurrent logins to a site. If a user needs to access two different WBSCM accounts concurrently, they can use a regular Chrome session as well as an Incognito window by performing the following steps:

1. Open (the **Chrome** browser).
2. Navigate to https://portal.wbscm.usda.gov/ and enter credentials. The user is logged into WBSCM with the first account.
3. Click (the **Three Dots** button) on the top right corner of the screen.
4. Click New Incognito window (the **New Incognito window** button).
5. Navigate to https://portal.wbscm.usda.gov/ and enter the second set of credentials. The user is logged into WBSCM with the second account.
6. Click (the **Close** button) to close the windows as necessary.
   All data and history of the incognito page will be automatically deleted once the page is exited.

Refer to the WBSCM Browser Settings and Helpful Tips Job Aid for more information about concurrent user logons.

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Application-Specific Updates

Vendor Registration Form

Chrome and other modern browsers do not support Adobe interactive forms, which must be accessed via Adobe Reader. The WBSCM Vendor Registration form is an interactive form used by prospective vendors. Please contact the AMS New Vendor Coordinator at NewVendor@usda.gov for a copy.

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Bid Invitation and Contracts Differences

For Bid Invitations some of the field locations have changed. The main differences are indicated below:

Before	After

For Contracts, the **Hierarchy** sub-tab which was not used in WBSCM is no longer available in the **Header** tab.

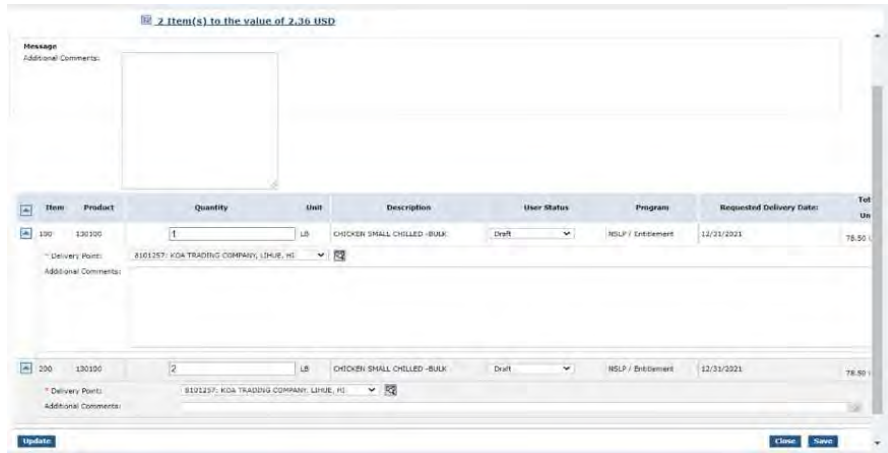| Before	After
Display Indefinite Delivery 4400000403	Display Indefinite Delivery 4400002693

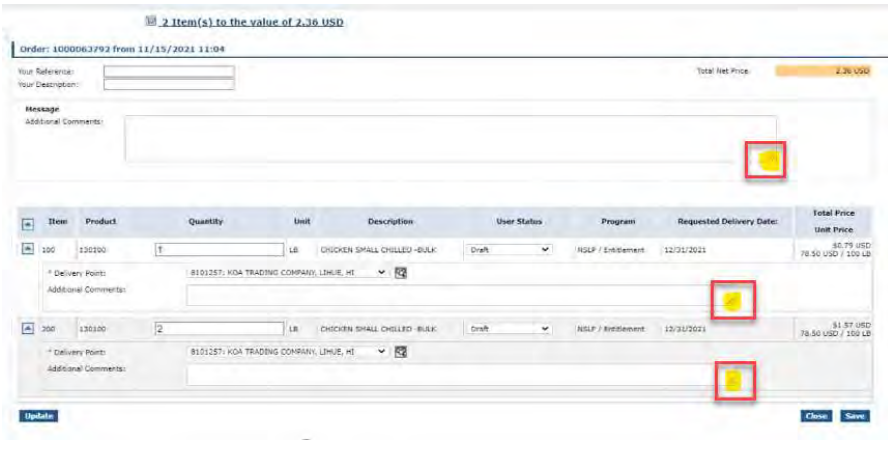2023-AMS-00030-F 000122

Order Entry Differences

On domestic and international order entry transactions, text boxes can be resized in Chrome by dragging the lower right corner. When using IE, text box size is static, requiring use of a vertical scroll bar to view additional text.

Before	After

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PrePo Purchase Requisition Differences

Some visual differences are noticed for the **Display/Change PrePo PR** transaction. Previously, the material number displayed only on the main screen, and the description on the detailed screen. Now, both the material number and description are visible in the same column on the main *Overview* screen, making it more user friendly and helping the user identify the correct description for each material number. The column width and display of other fields may be visibly different; however, there is no change in functionality.

Before	After
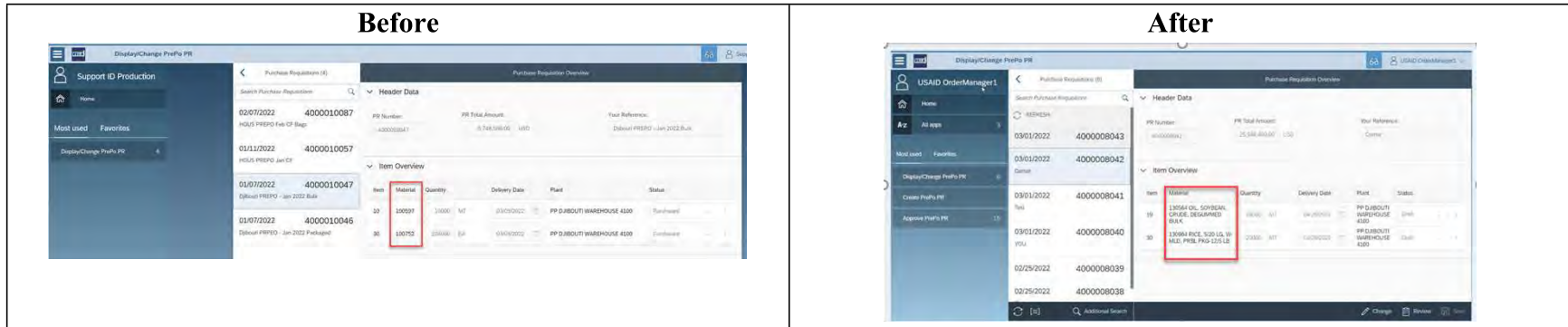
Also, the **Launchpad Open/Close** button can be used to collapse the left-hand navigation panel, and the user can adjust their screen resolution for better display options. Refer to the Display/Change PrePo PR Using WBSCM App job aid for more information.

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Enter Shipment Receipt Differences

After the upgrade, the **Enter Shipment Receipt** transaction displays goods receipt message type and descriptions in a different order, and the position of page titles has shifted.

Before	After

Refer to the Enter Domestic Shipment Receipt work instruction for the most up-to-date instructions and screen captures.

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Reports

Report Titles

The following report titles have been updated; there is no change in functionality:

Name of Report - Before	Name of Report - After
WBSCM Portal Path: *Reports ➜ Order Processing*	
Delivery Schedule Report	National Warehouse Delivery Schedule
WBSCM Portal Path: *Operations ➜ Procurement ➜ Contract Formation ➜ Pre-Optimization Reports*	
Pre-optimization Procurement Funding Report	Procurement Funding Report
Vendor Constraints Report	Vendor Constraints by Bid Invitation
Bid Summary Report	International Bid Summary Report

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BI Entitlement Reports

After the upgrade, screen display and button have changed in BI Entitlement reports.

Before	After
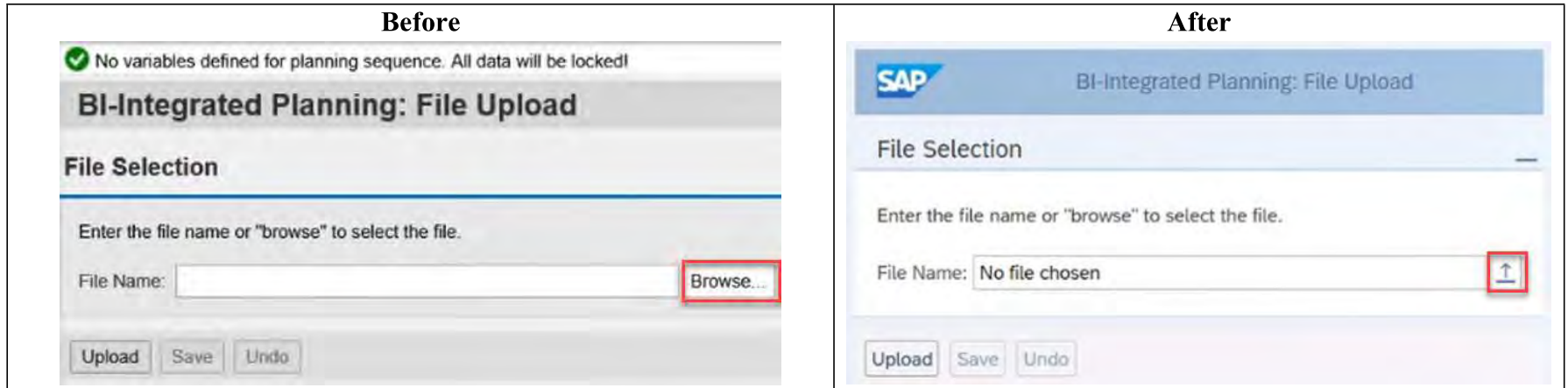
Refer to the Maintain SDA/ITO Entitlements and Maintain RA Entitlements work instructions for the most up-to-date instructions and screen captures.

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Order Processing and Status Reports

In addition to the general report updates mentioned in this guide, the **Program** field on processing and status reports has been expanded from 5 to 40 characters. Additionally, the **Program** selection drop-down has been updated to include the full program description. Invalid values have been removed. For example, refer to the Review Order Status Report work instruction for most up-to-date instructions.

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Open Issues and Workarounds

The table below identifies the **WBSCM Upgrade** issues that are unresolved at the time of this publication. Issues are actively being worked, some with software vendor (SAP) assistance, and will be resolved through forthcoming releases. The timeframe for resolution is currently not confirmed.

Open/Unresolved Upgrades Issues

Impacted User Group	Open/Unresolved Ticket Description
All Users	WBSCM output tables have noticeable visual differences; refer to the WBSCM Output Table differences section for more details. The WBSCM team is continuing to work with the software vendor (SAP) to determine a potential solution.
All Users	The user may experience delays in posting files in the Public Procurement page when certain background processes fail unexpectedly. The latest receiving status for payments may not post in a timely manner. The affected interfaces are being monitored on an ongoing basis and manually corrected as needed. The WBSCM team is continuing to monitor; no issues observed in Production at this time.
AMS International International Vendors	In the **Vendor Response** application, if the user scrolls up or down, See Conditions (the **See Conditions** link) from the **Price** column disappears. As a workaround, the user can go to the **Conditions** tab, after clicking the line item, to view the price details. A potential fix has been provided by the software vendor (SAP) and the WBSCM team is working to validate the solution.

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Impacted User Group	Open/Unresolved Ticket Description
AMS Domestic AMS International	For PO Modification, during the Order and Approve process, the user may encounter performance issues for POs with more than 400 lines. The WBSCM team is continuing to work with the software vendor (SAP) to determine a potential solution.
AMS Domestic AMS International	For domestic and international POs, the user is not able to change the business partner directly and save it afterwards. Users must first press the **Clear** button to remove existing data, enter the new partner, then save and refresh to see the updated information. A potential fix has been provided by the software vendor (SAP) and the WBSCM team is working to validate the solution.
AMS Domestic AMS International	When the user accesses **Records Management** using the **Related Links** button in the **Display PO** transaction, the screen displays correctly. Subsequently, if the user attempts to close the transaction using the **Close Tab** button, an error message displays. The user must exit the application and re-open if additional data is needed from **Records Management**. A potential solution has been provided by the software vendor (SAP) and the WBSCM team is working to validate the solution.
AMS Domestic AMS International	When updating PO lines using the market price update functionality, the user may not see the new total value in the PO Line Items overview. As a workaround, the user can manually update the price or utilize the import/export process to modify PO data. A potential fix has been identified and the WBSCM team is working to validate the solution.

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