PROCESS OVERVIEW

Purpose

The purpose of this document is to create a multi-food order by State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs). Multi-food orders are sourced from a warehouse; a multi-food order is not the same as a domestic requisition and is not consolidated. When navigating through the catalog, all available multi-food products are displayed after clicking on the multi-food link. Currently multi-food is available only to programs CSFP and FDPIR. Multi-food delivery calendars are set by the National Warehouse Admin. The available delivery dates and Ship-To locations are displayed when creating a multi-food order.

Process Trigger

Use this transaction when the user needs to create a multi-food order.

Prerequisites

- A catalog view must be assigned to the organization.
- Delivery dates must be assigned to Sold-To and Ship-To locations.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder to go to the *Domestic Order Entry* link

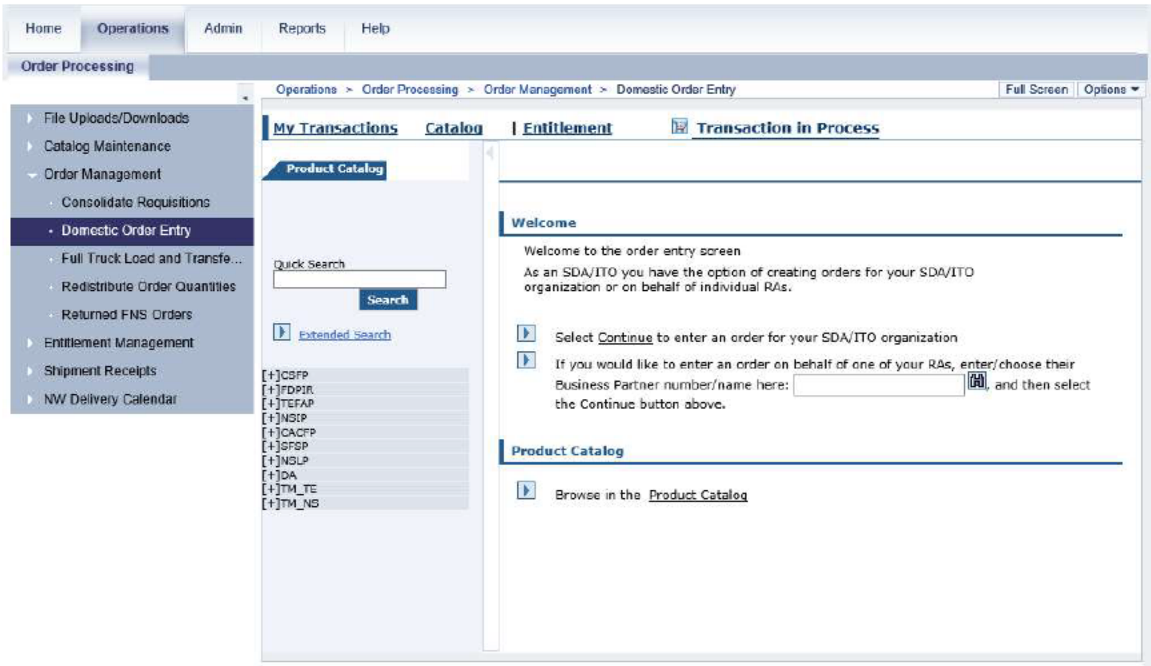
Tips and Tricks

- The **R/O/C** acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Domestic Order Entry** link.

Image: Domestic Order Entry Screen

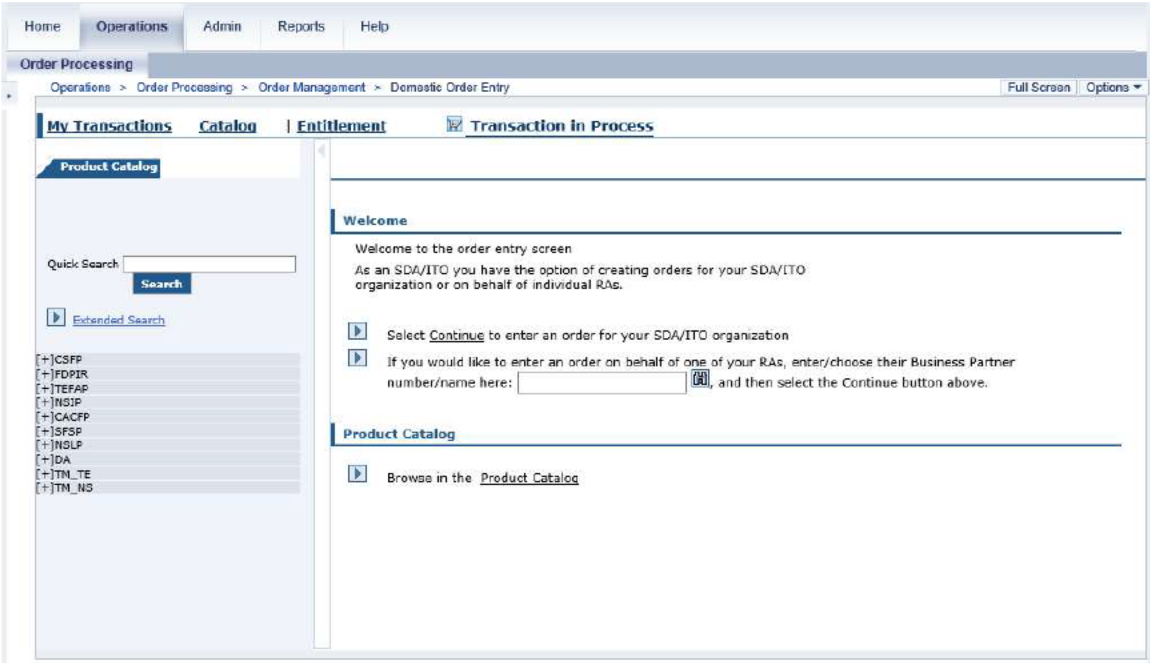


2. Click (the **Hide Navigator** button) to hide the Portal menu.

3. Perform one of the following:

If	Then
The user is ordering on behalf of an RA	Go to Step 4.
The user is ordering for their own organization	Go to Step 5.

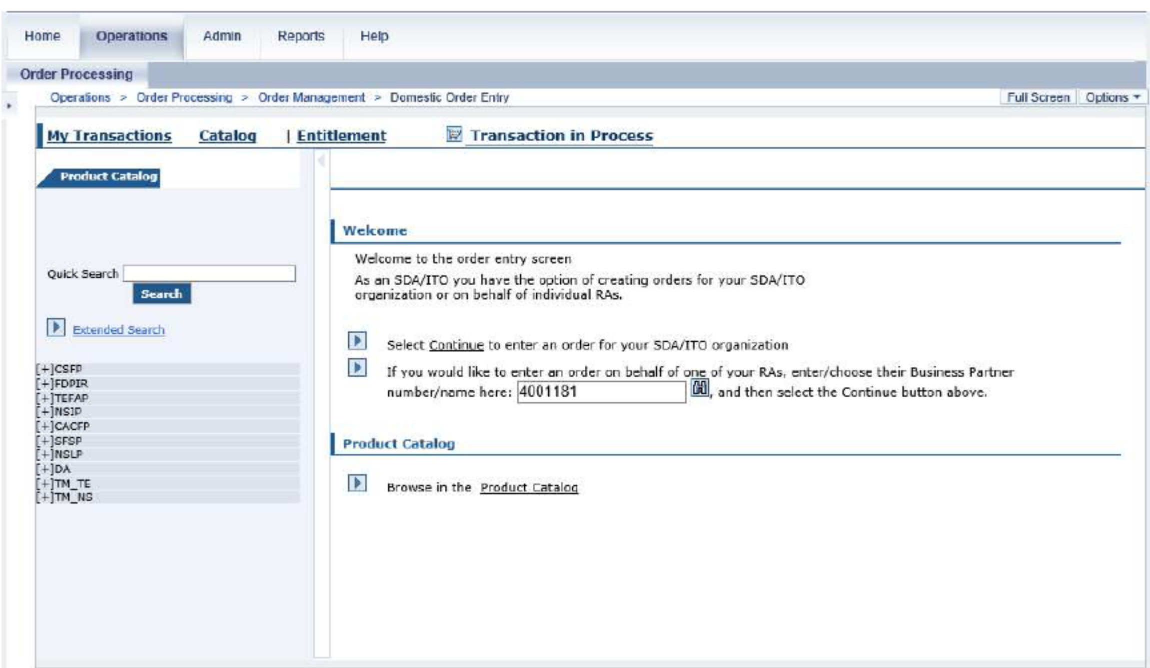
Image: Domestic Order Entry Screen



4. Enter the RA's BP number in the text box or click (the **Binoculars** icon). In this example, **4001181** was entered.

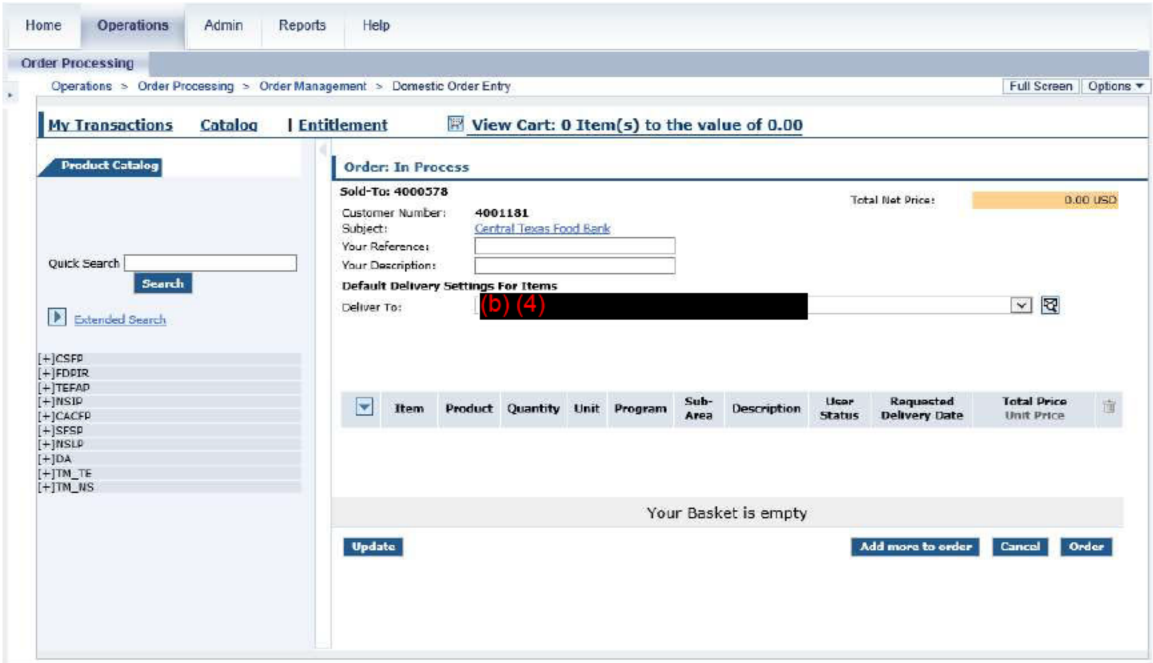
(Note) If the textbox is not displayed, the RA may be selected from a dropdown list instead.

Image: Domestic Order Entry Screen



5. Click Continue (the **Continue** link) under the *Welcome* section, to begin entering the order.

Image: Domestic Order Entry Screen

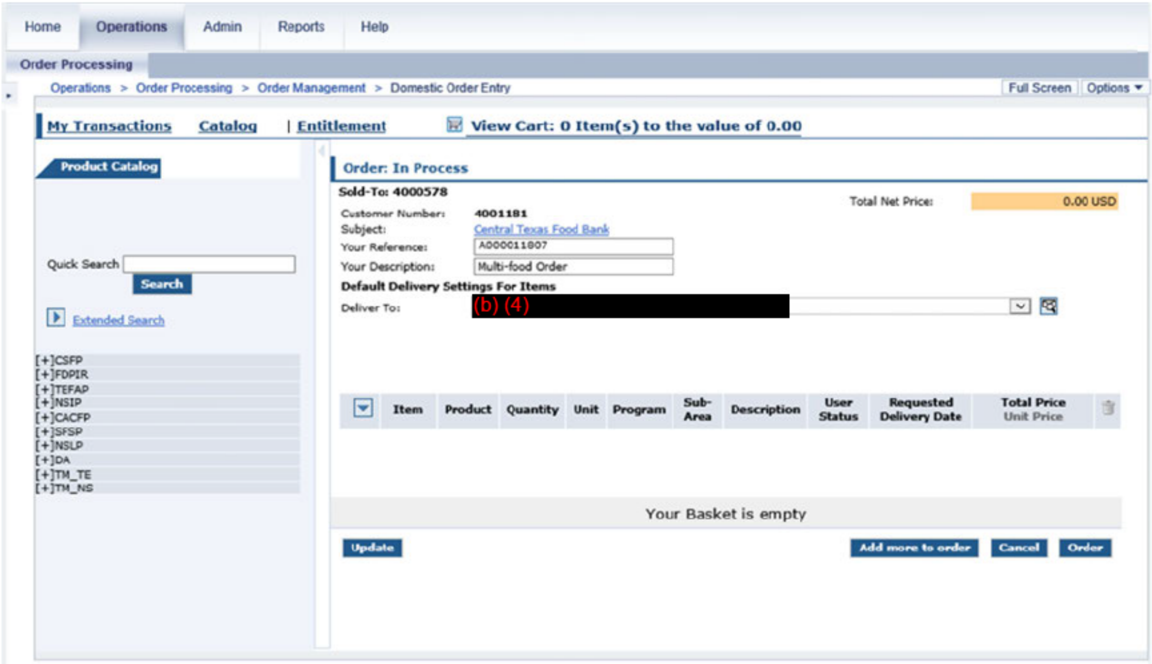


6. As required, complete/review the following fields:

Field	R/O/C	Description
Your Reference:	O	A free text field which allows for further clarification of an entry by reference to other sources of information. **Example:** A000011807
Your Description:	O	A free text field describing the order or complaint issue. **Example:** Multi-food Order (Note) This field can be used to enter a description of the order or an External sales order number.

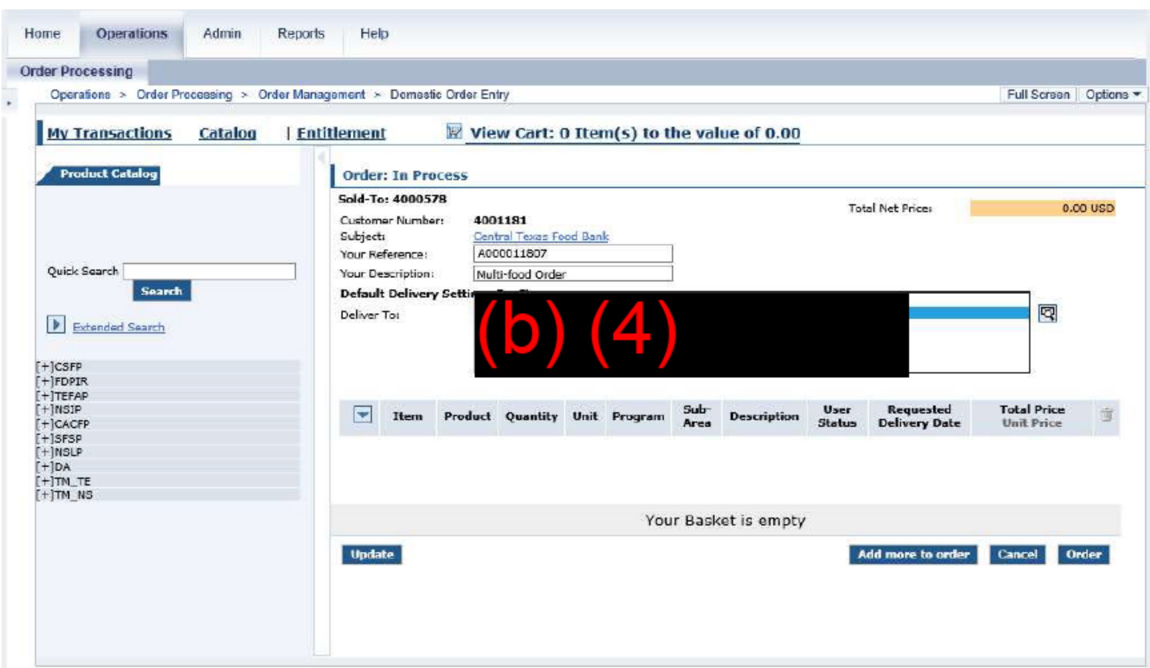
(Note) The order pre-populates with the **Sold-To Party Number** (customer number). The **Your Reference** and **Your Description** fields are an optional way for an SDA/ITO to recognize orders in WBSCM later.

Image: Domestic Order Entry Screen



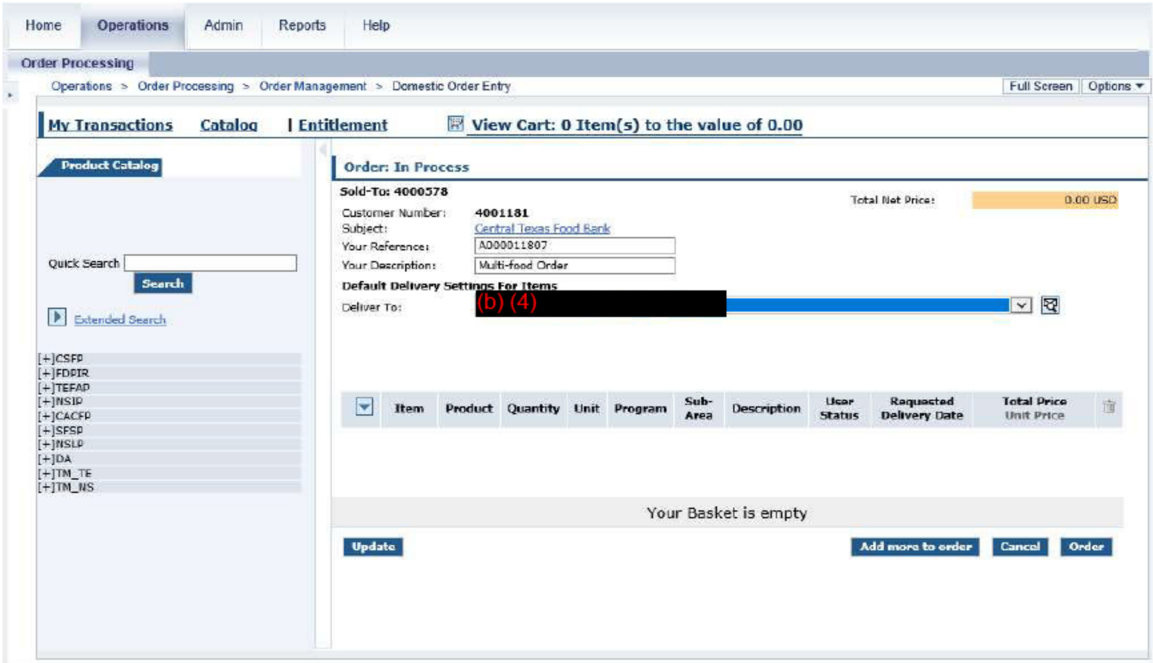
7. Click (the **Dropdown** button) in the **Deliver To:** field to select the desired Ship-To destination.

Image: Domestic Order Entry Screen



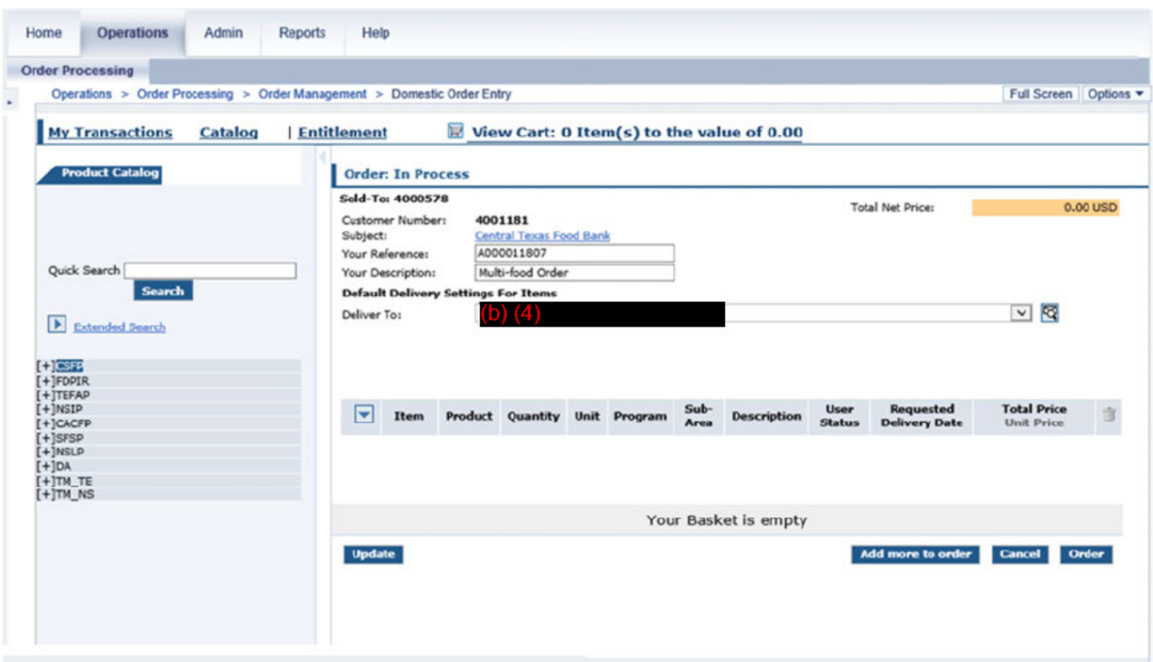
8. Select the desired Ship-To destination from the **Deliver To:** dropdown list. In this example, (b) (4) [redacted] option) was selected.

Image: Domestic Order Entry Screen



9. Click **Update** (the **Update** button) to save the **Deliver To:** destination and any optional text entered in the header.

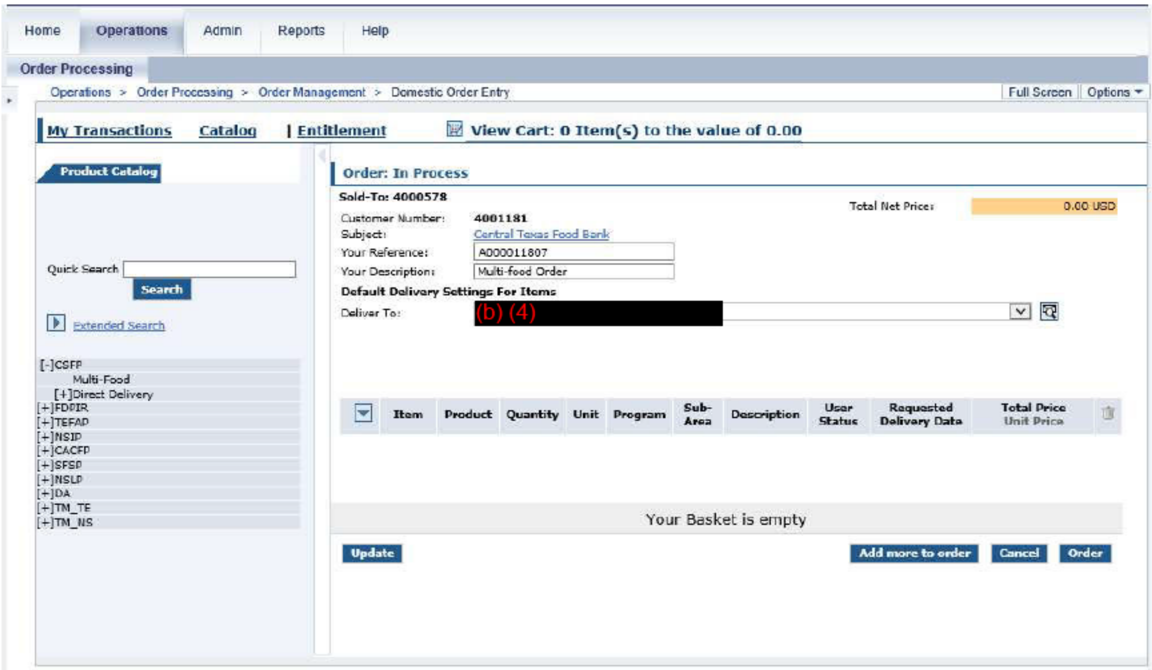
Image: Domestic Order Entry Screen



10. In the Product Catalog, click [+] (the **Plus** icon) next to the appropriate program. In this example, [+]CSFP (the **CSFP** option) was selected.

(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program. The user will see only programs with which their SDA, ITO, or RA is affiliated. Multi-food orders are available only to CSFP and FDPIR.

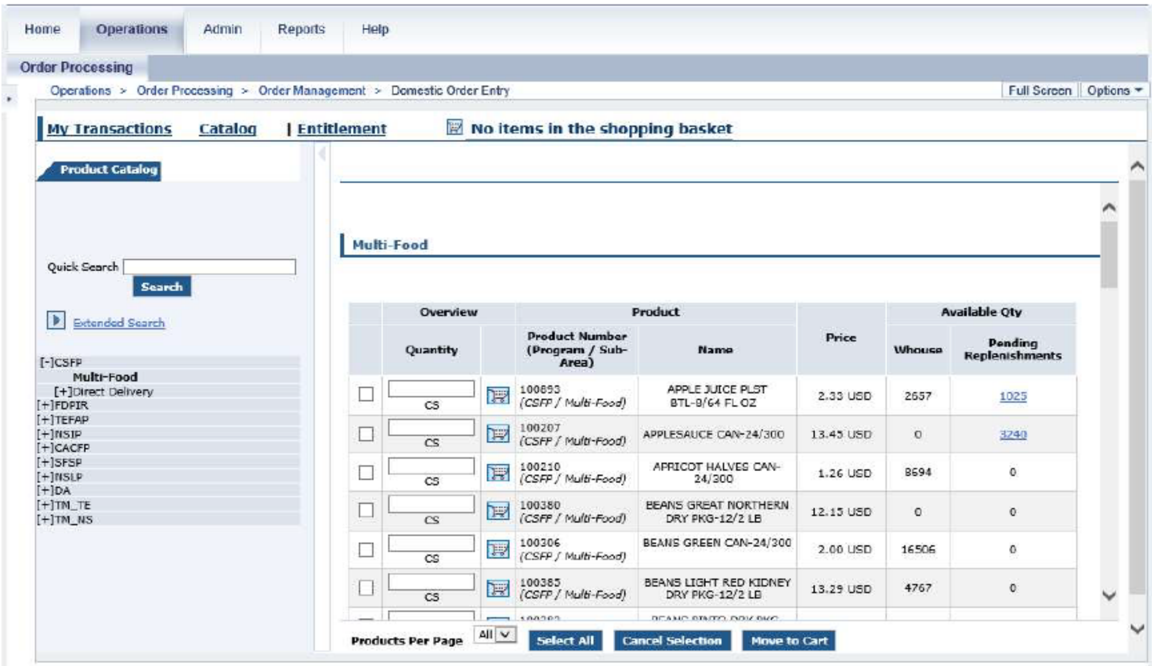
Image: Domestic Order Entry Screen



11. Click Multi-Food (the **Multi-Food** link) after selecting the desired program. In this example, Multi-Food (the **Multi-Food** option) under **CSFP** was selected.

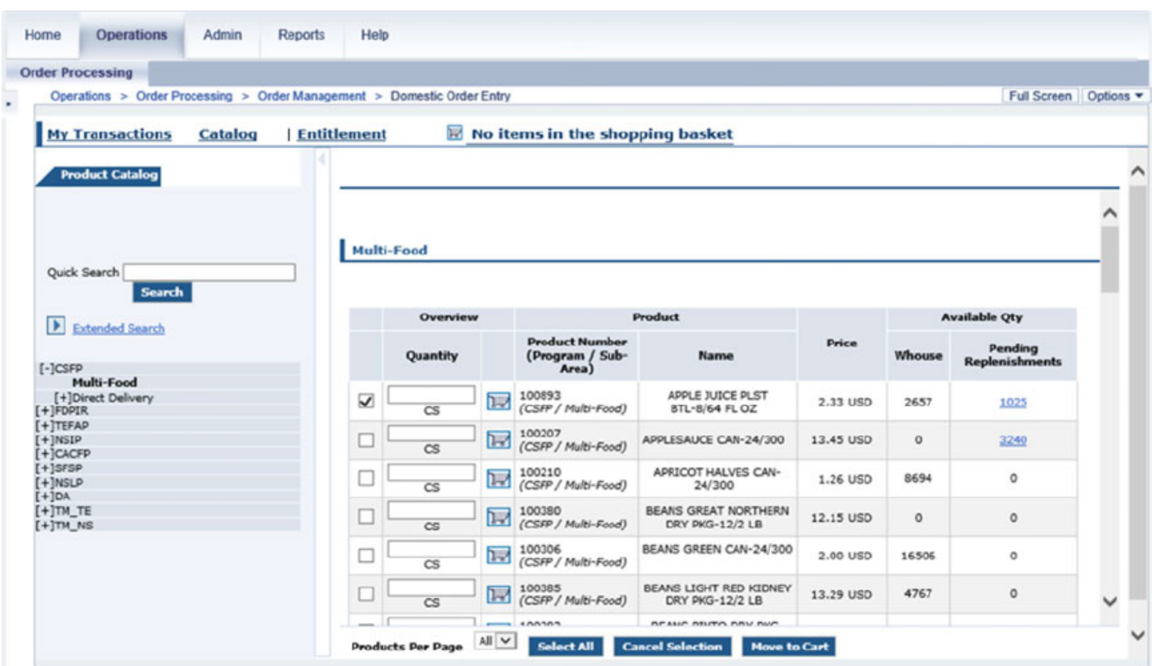
(Note) After selecting the **Multi-Food** link, all the available products will display on the right-hand side of the screen.

Image: Domestic Order Entry Screen



12. Click ☐ (the **Check Box** icon) next to the line item for the required product to add it to the cart. In this example, the line item for product number **100893** was selected.

Image: Domestic Order Entry Screen

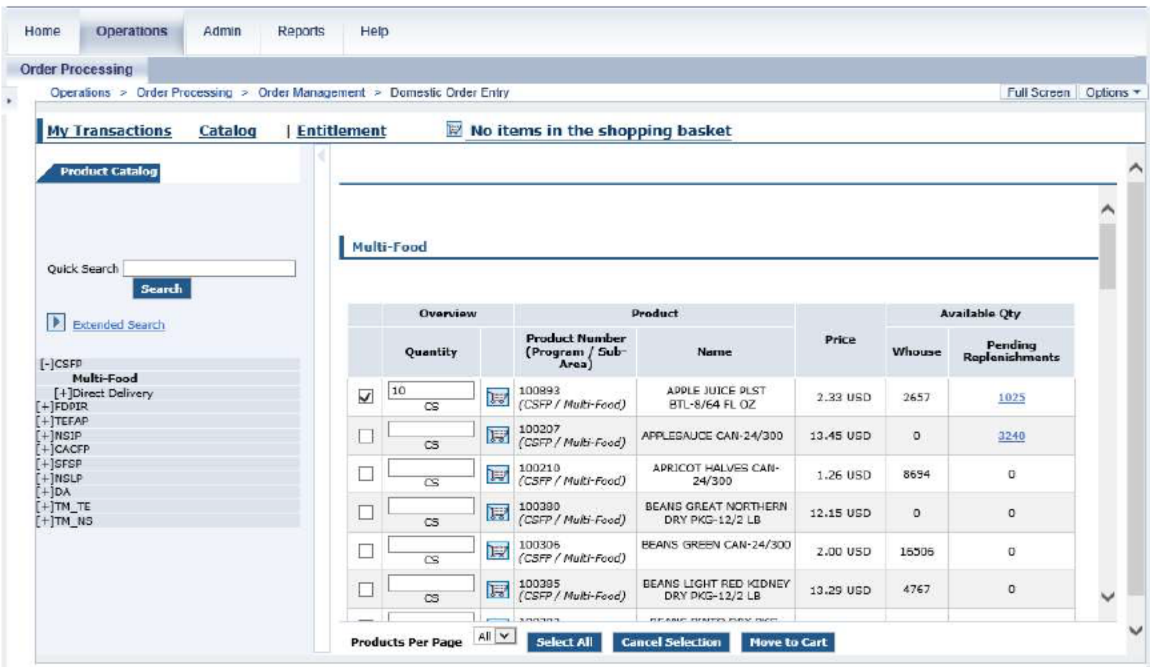


13. As required, complete/review the following fields:

Field	R/O/C	Description
Quantity	R	Number of items. **Example:** 10

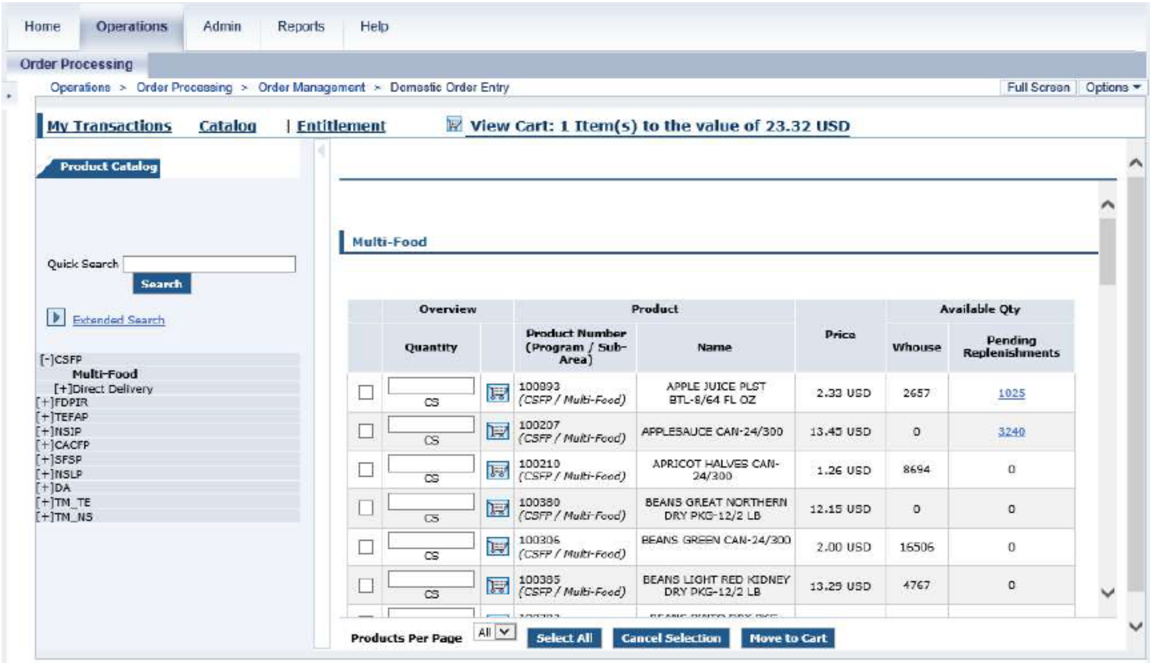
(Note) The **Available Qty** columns reflect the quantity currently on hand at the national warehouses and quantities on order for replenishment. Order that exceed available quantities may not be processed or are subject to being cancelled or delayed.

Image: Domestic Order Entry Screen



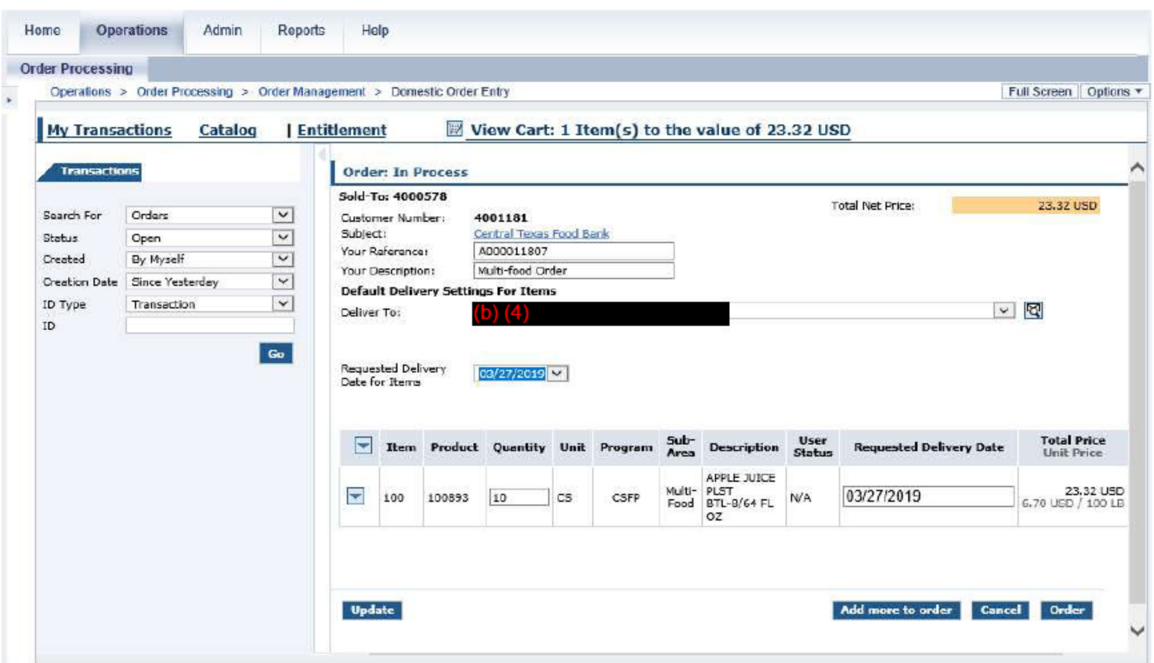
14. Click (the **Shopping Cart** button) to add the product to the cart.

Image: Domestic Order Entry Screen



15. Click on View Cart: (the **View Cart:** link) to view the items added to the cart. In this example, View Cart: 1 Item(s) to the value of 23.32 USD (the **View Cart: 1 Item(s) to the value of 23.32 USD** link) was selected.

Image: Domestic Order Entry Screen



16. Click on (the **Dropdown** button) in the **Requested Delivery Date** to select a delivery date. In this example, 03/27/2019 (the **04/03/2019** date) was selected.

(Note) Click (the **Hide Navigator** button) to hide the *Transaction* Pane to maximize the screen.

(Note) If there are no delivery dates listed, possible reasons include:

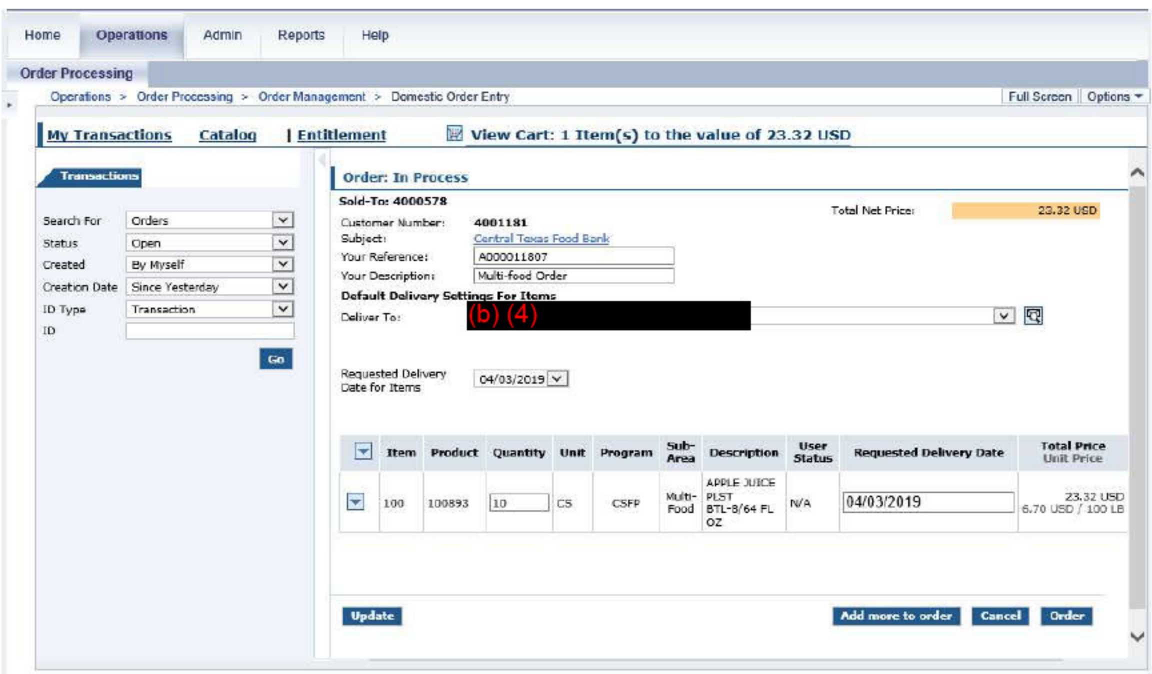
- The user has missed the window for the next delivery date.
- The user has selected a delivery location that only has non-delivery dates.

(Note) Once selected, the delivery date for each product will be displayed in the **Requested Delivery Date** column.

17. Perform one of the following:

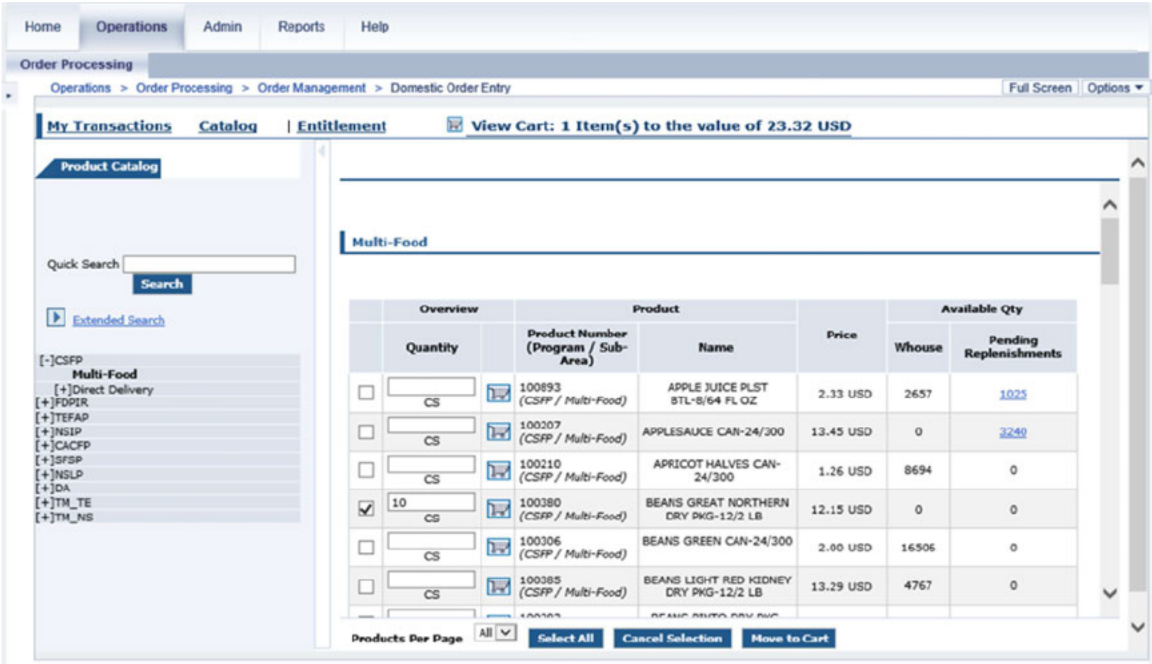
If	Then
The user needs to add another item to the order	Go to Step 18.
The user needs to update quantity for an item in the cart	Go to Step 23.
The user needs to delete item(s) from the order	Go to Step 27.
The user is ready to submit the order	Go to Step 30.

Image: Domestic Order Entry Screen



18. Click Add more to order (the **Add more to order** button) to add a new product to this order.

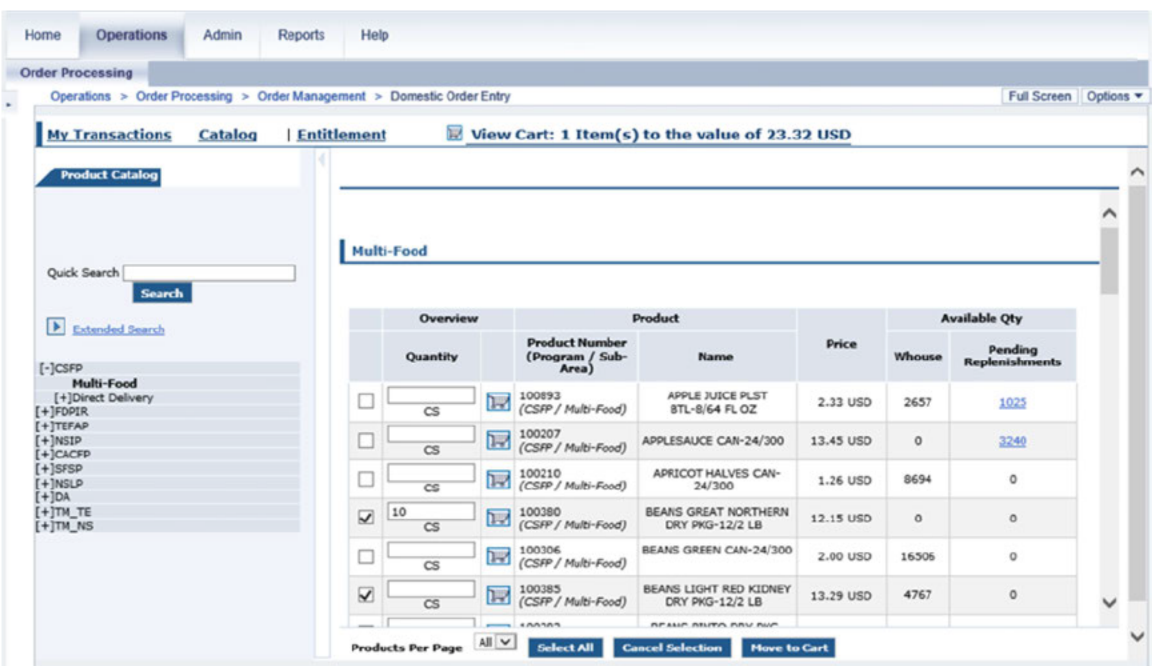
Image: Domestic Order Entry Screen



19. Click (the **Check Box**) next to the line item for the required product. In this example, the line item for product **100385** was selected.

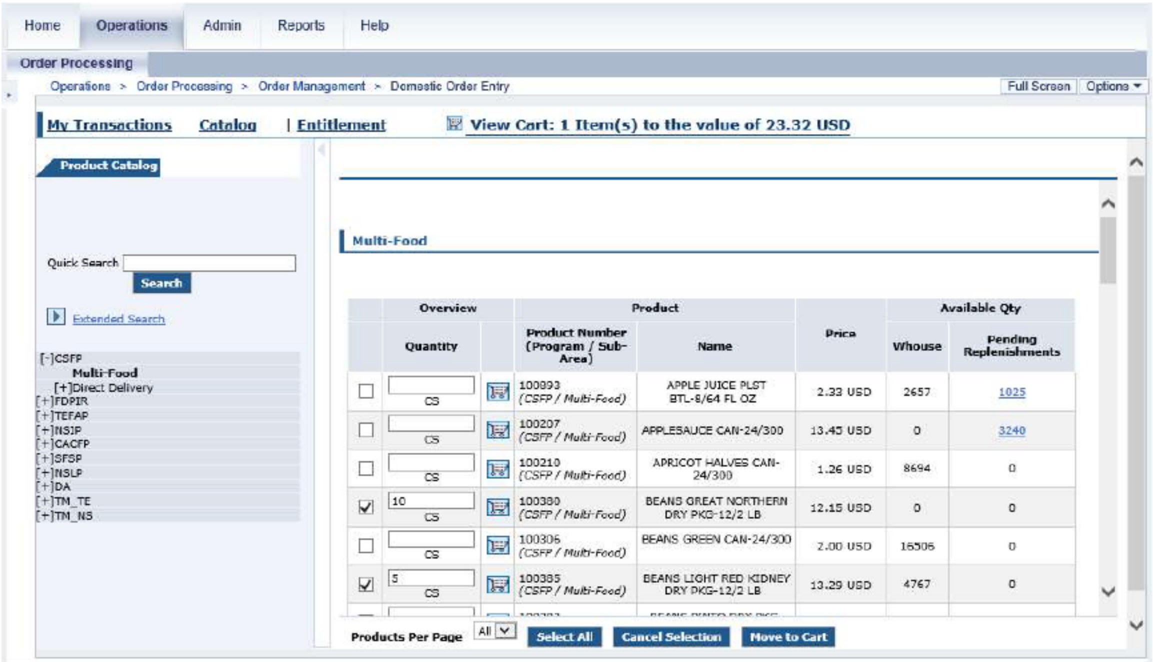
(Note) All checked products can be added to the cart at the same time.

Image: Domestic Order Entry Screen



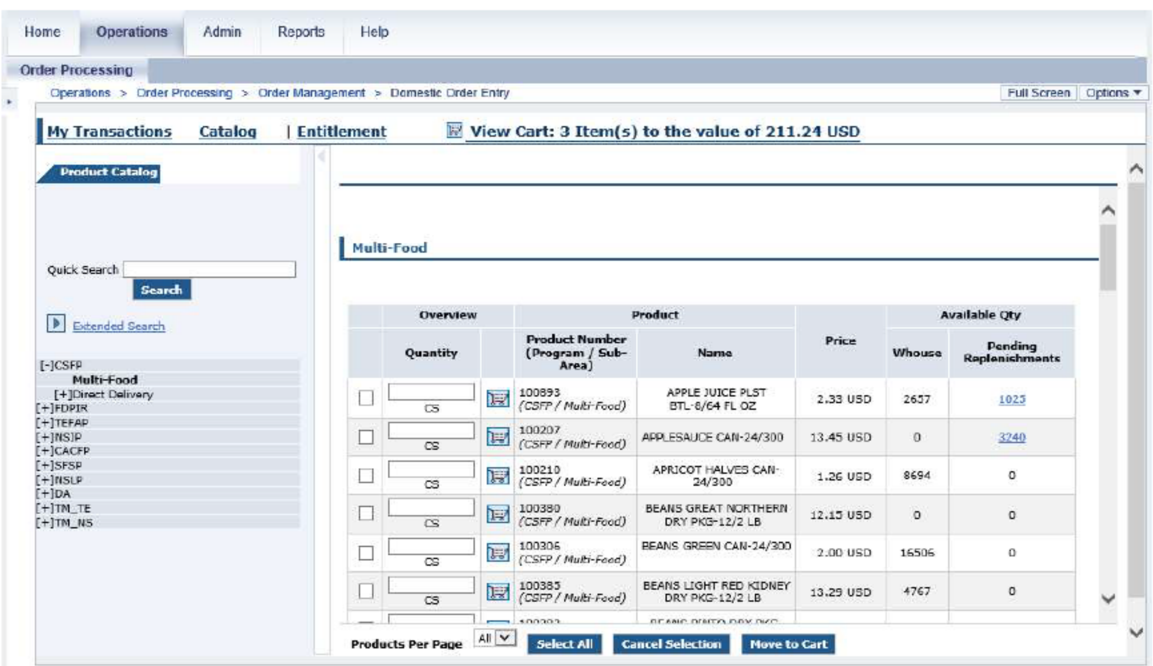
20. In the **Quantity** field enter the desired quantity. In this example, 5 was entered in the **Quantity** field for product **100385.**

Image: Domestic Order Entry Screen



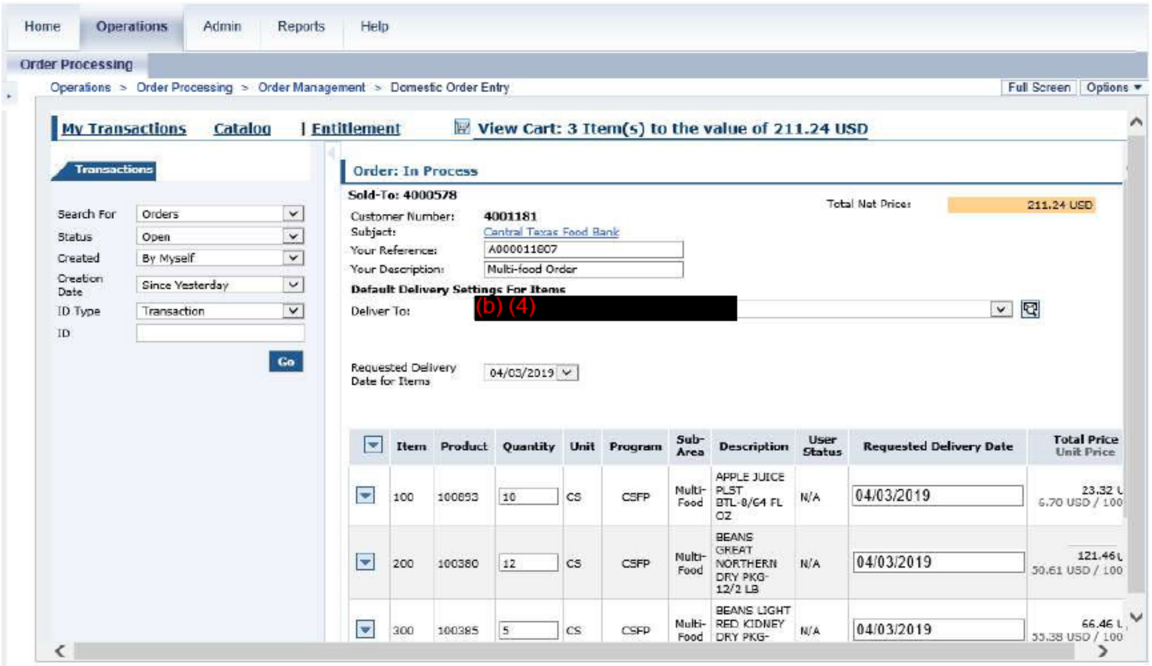
21. Click **Move to Cart** (the **Move to Cart** button) on the bottom of the screen.

Image: Domestic Order Entry Screen



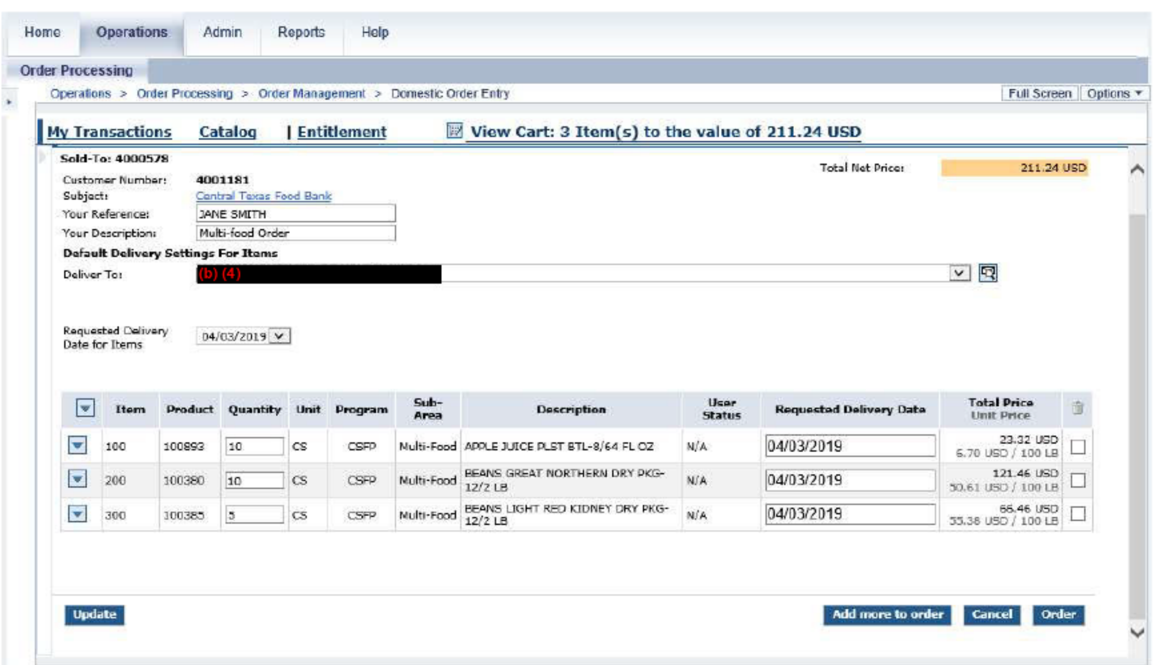
22. Click View Cart: (the **View Cart:** link) to view items added to the cart. In this example, View Cart: 3 Item(s) to the value of 211.24 USD (the **View Cart: 3 Item(s) to the value of 211.24 USD** link) was selected.

Image: Domestic Order Entry Screen



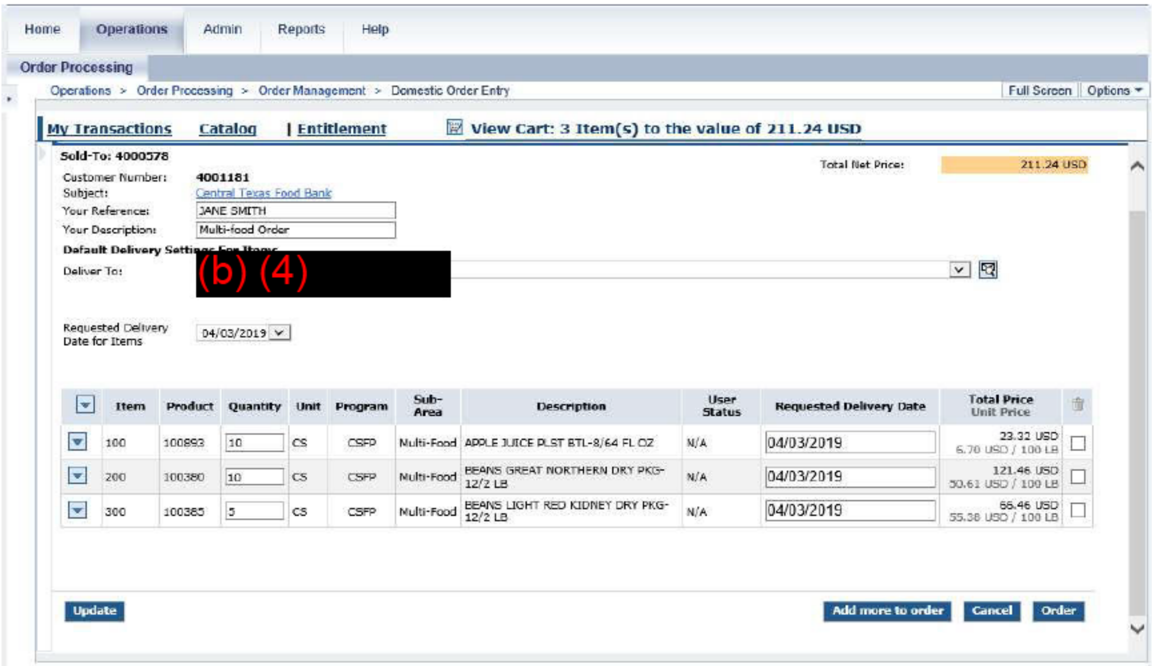
23. Click (the **Hide Navigator** button) to hide the *Transaction* Pane

Image: Domestic Order Entry Screen



24. Update the **Quantity** field, as appropriate, for the required line item.

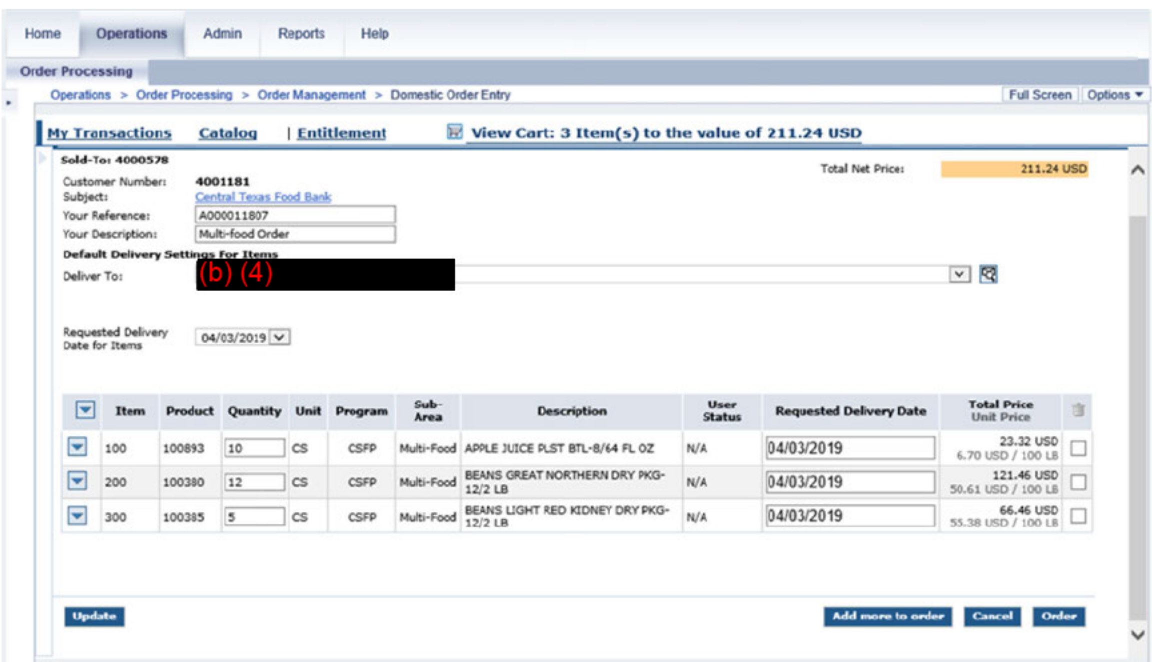
Image: Domestic Order Entry Screen



25. Click Update (the **Update** button) to apply changes.

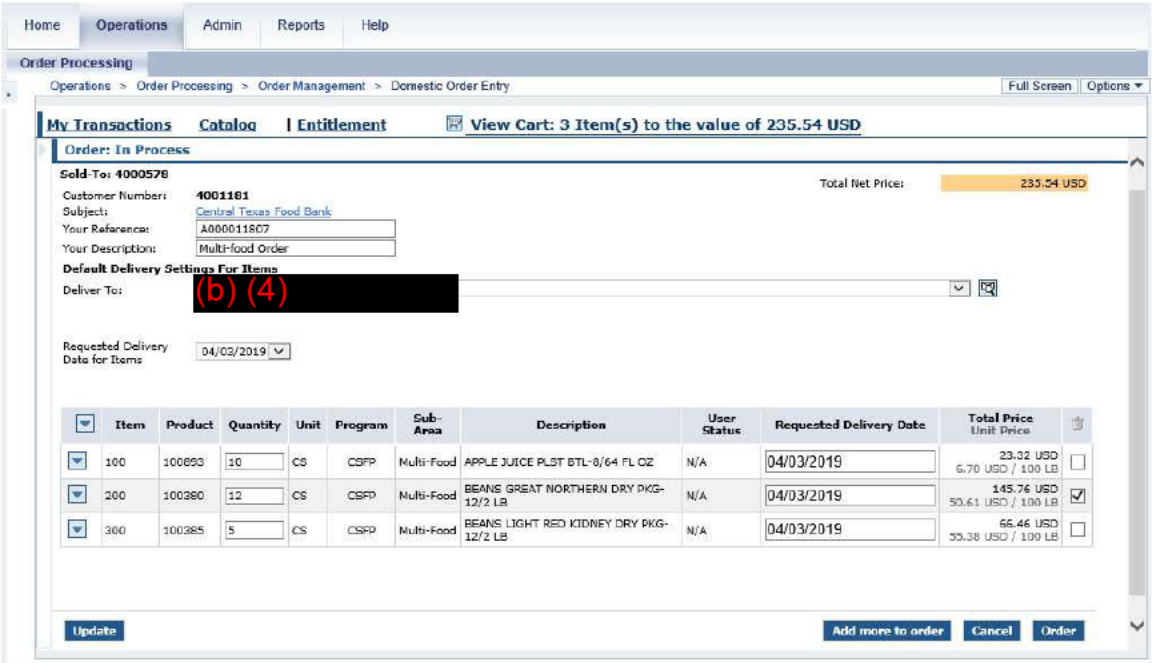
26. Return to Step 17.

Image: Domestic Order Entry Screen



27. Click (the **Check Box**) underneath the **Trashcan** column to select a line to be deleted. In this example, the second line item was selected.

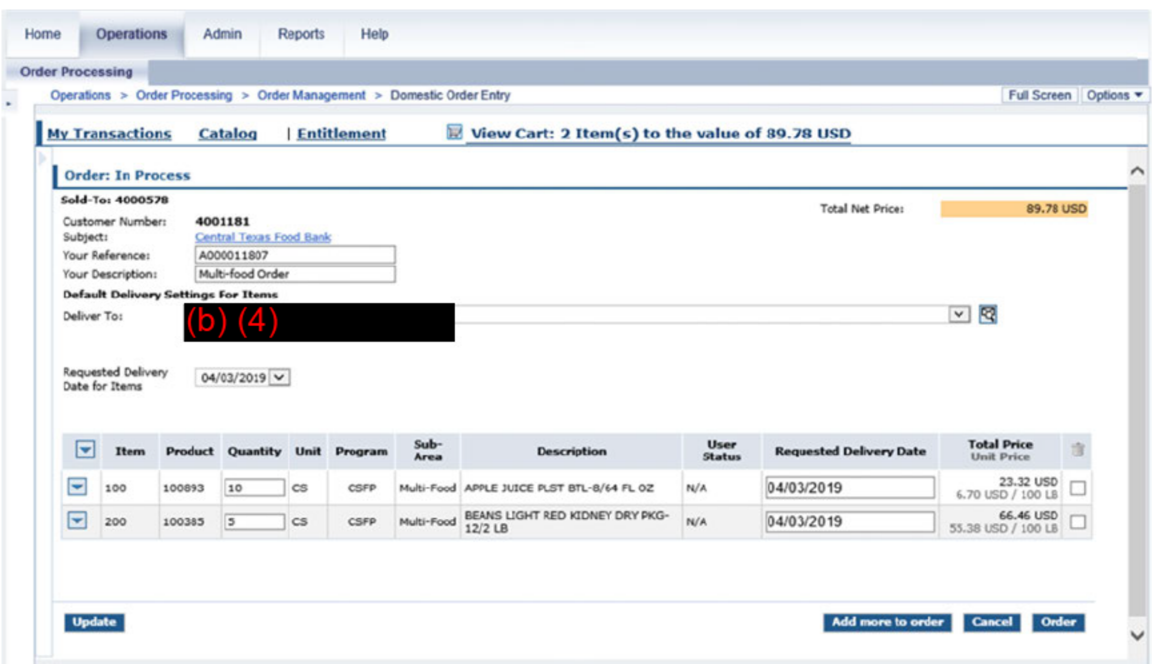
Image: Domestic Order Entry Screen



28. Click **Update** (the **Update** button) to delete the selected line(s).

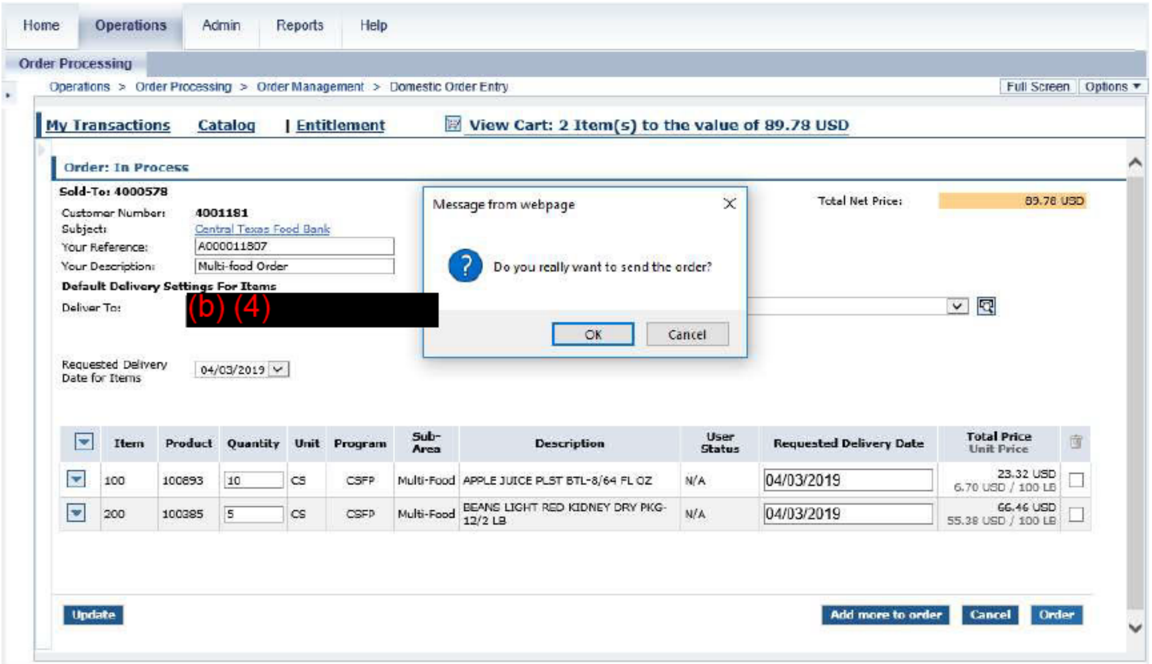
29. Return to Step 17.

Image: Domestic Order Entry Screen



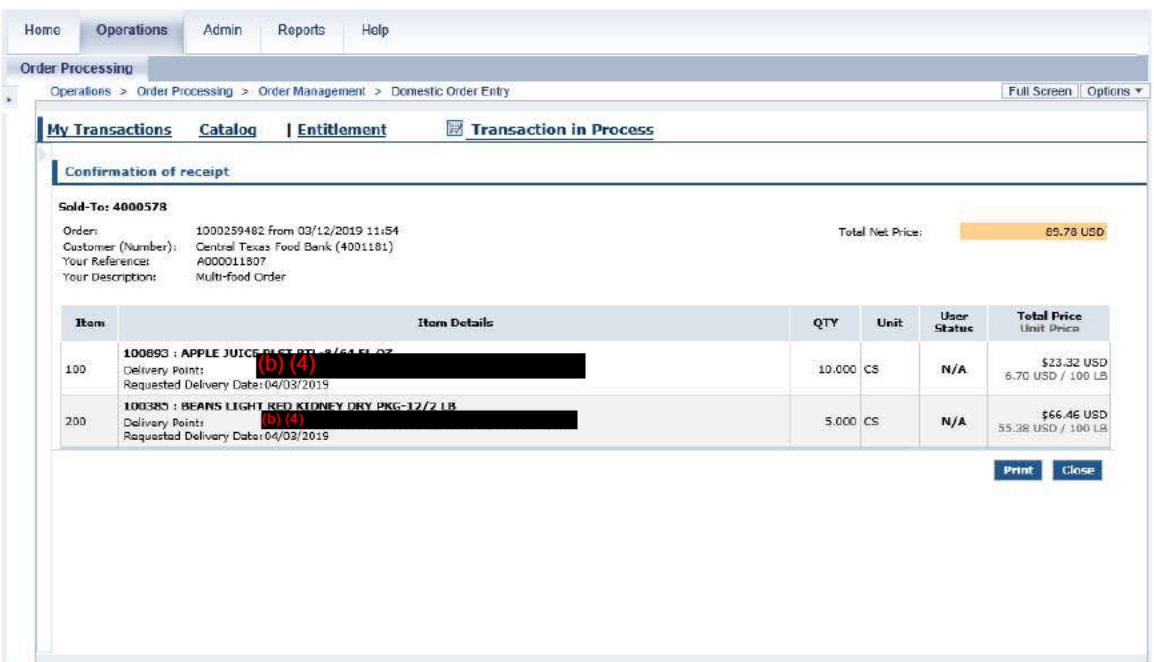
30. Click **Order** (the **Order** button) to submit this order.

Image: Domestic Order Entry Screen



31. Click OK (the **OK** button) on the pop-up screen to confirm order submission.

Image: Domestic Order Entry Screen



32. The transaction is complete.

(Note) The order number will be required to display or modify the order in the future. For reference, record the order number displayed on the *Confirmation for Receipt* screen.

RESULT

A multi-food order was created, including, selecting a Ship-To destination, adding items to the order, and selecting a delivery date. As applicable, quantities and items may have been updated before submitting the order.

PROCESS OVERVIEW

Purpose

A Recipient Agency (RA) is a domestic customer organization that can create domestic requisitions in WBSCM. RA organizations are created and maintained by State Distributing Agency (SDA) Org Admins. SDA Org Admins use this transaction to create a new RA Organization in the WBSCM system. This includes adding address information as well as assigning business partners, and programs for the new RA organization.

Note: An SDA cannot delete an RA. Contact the WBSCM Service Desk for assistance to delete an RA from WBSCM.

Process Trigger

Use this transaction to create a new RA Organization in the WBSCM system.

Prerequisites

SDA must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab ➔ **Organization Maintenance** folder ➔ **Maintain Organization** link ➔ **Create RA Organization** link to go to the *Create RA Organization* screen.

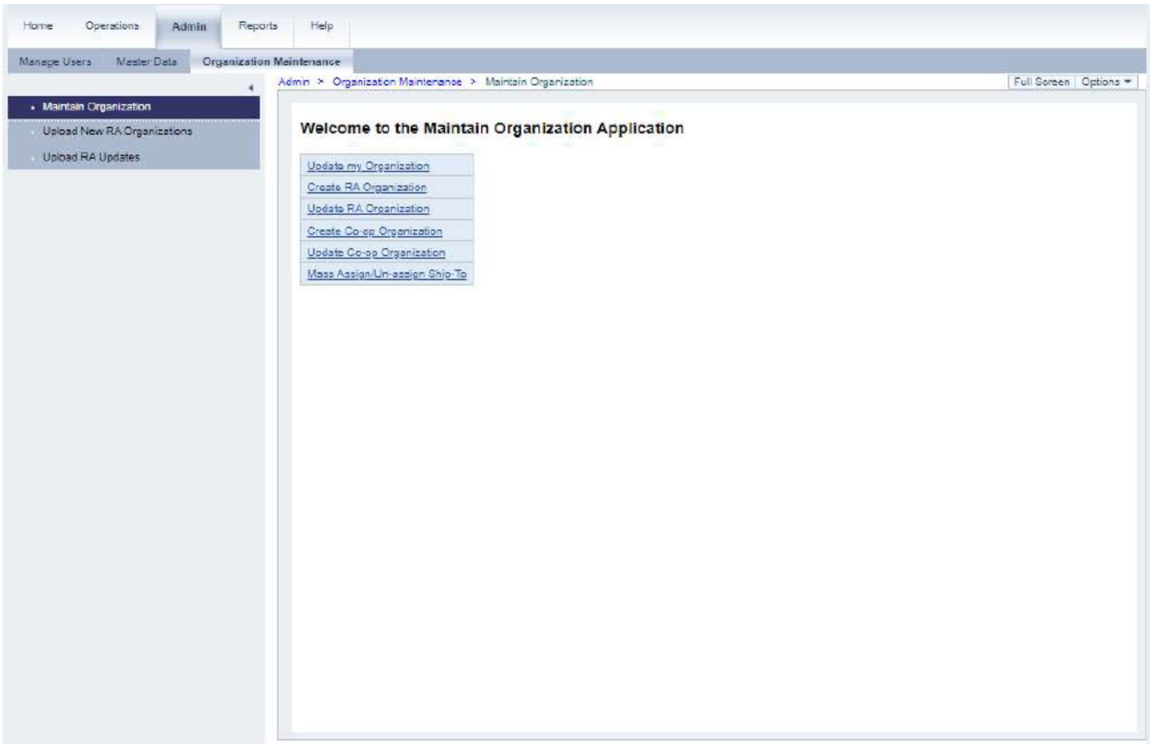
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigational training and tips on creating favorites, performing searches, etc.

PROCEDURE

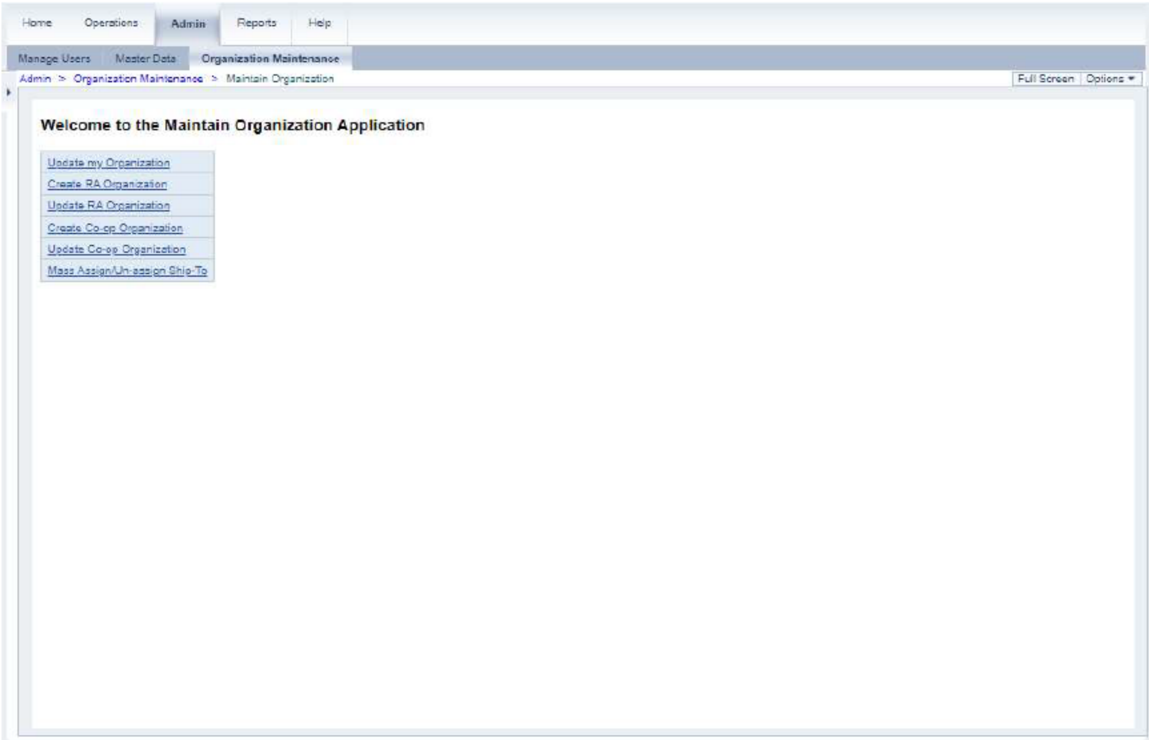
1. Start the transaction using the Portal path: **Admin** tab ➔ **Organization Maintenance** folder ➔ **Maintain Organization** link.

Image: Maintain Organization Screen



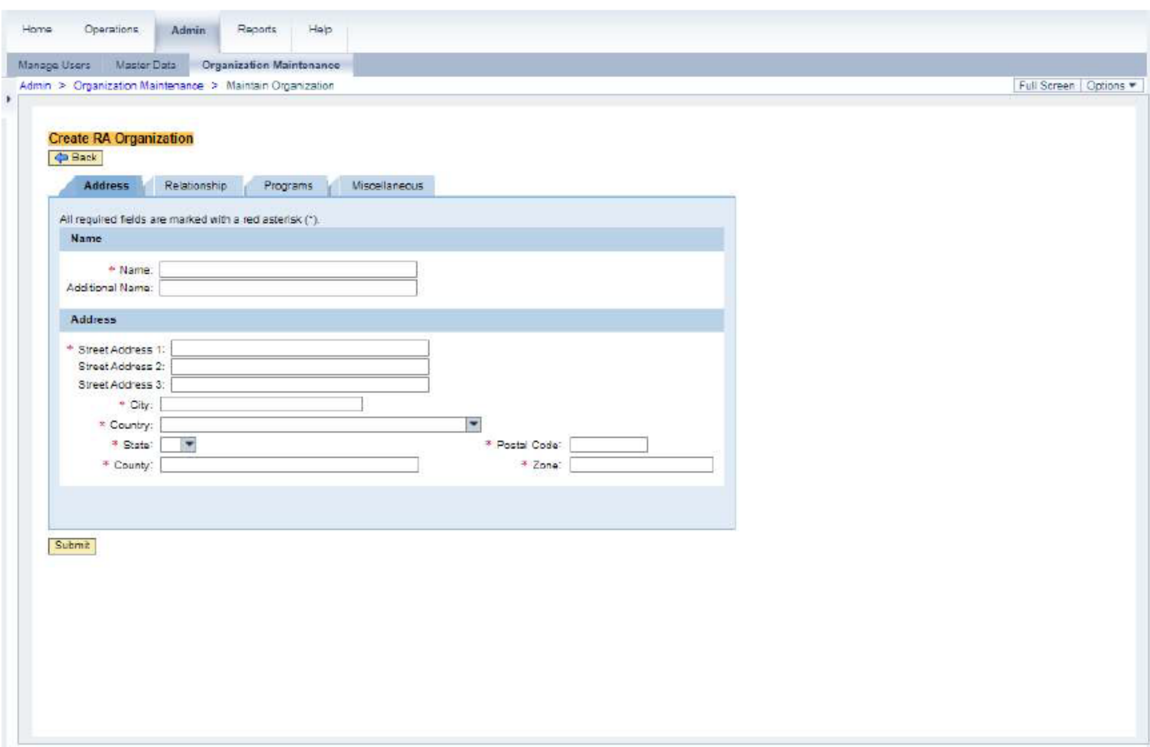
2. Click (the **Hide Navigator** button) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Maintain Organization Screen



3. Click Create RA Organization (the **Create RA Organization** link).

Image: Create RA Organization (Address) Screen

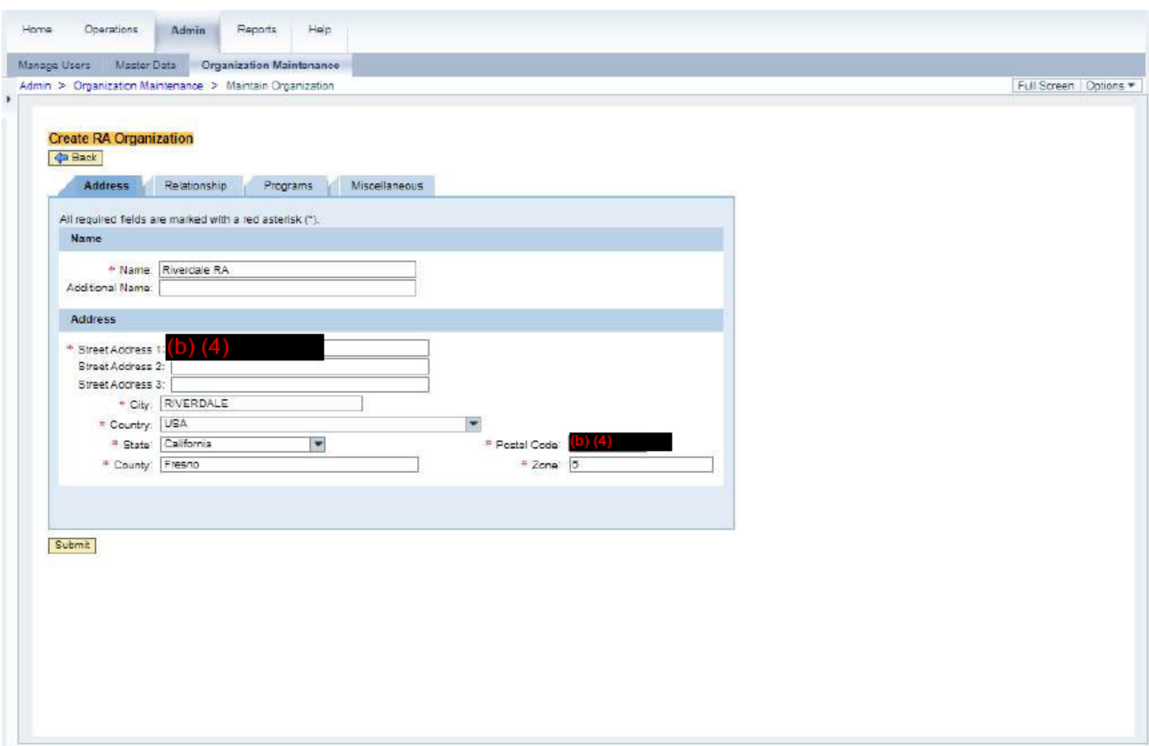


4. As required, complete/review the following fields:

Field	R/O/C	Description
Name:	R	Person or business partner's name. **Example:** Riverdale RA (Note) Enter the name of the RA's organization.
Street Address 1:	R	A free text field in which to enter the street address of the user or organization. **Example:** (Note) Enter the street address for the RA's headquarters.
City:	R	City where the user or organization is located. **Example:** Riverdale (Note) Enter the city for the RA's headquarters.
Country:	R	Country code that represents country name. **Example:** USA (Note) Enter or select the name of the country where the RA is located. Typically this field is populated with **USA** unless it is a domestic offshore location.
State:	R	The abbreviation or name of United States territory, district, or state. **Example:** California
County:	R	Region or geographical area. **Example:** Fresno
Postal Code:	R	A ZIP code. **Example:** 93656-9408

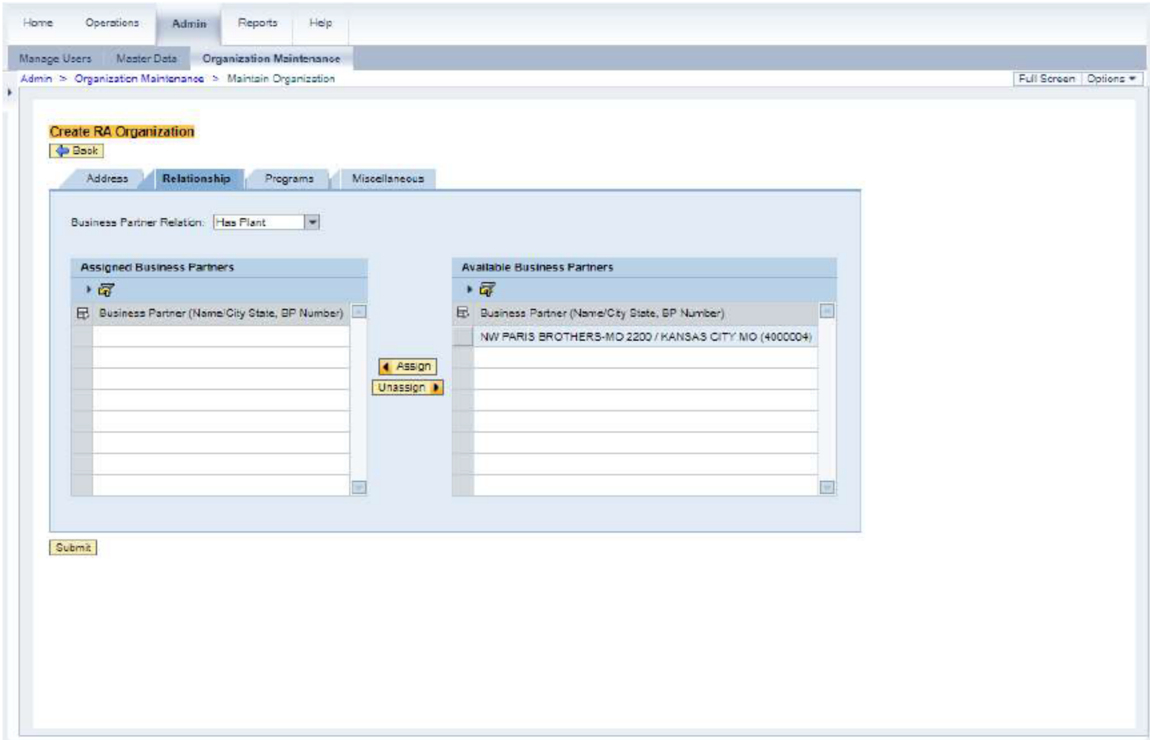
Field	R/O/C	Description
Zone:	R	Identifying number assigned to an RA by their SDA. **Example:** 5 (Note) Zone where the RA is located. The RA should be assigned the same zone as its SDA. • Zone 1 is NERO (Northeast Regional Office) • Zone 2 is MARO (Mid-Atlantic Regional Office) • Zone 3 is SERO (Southeast Regional Office) • Zone 4 is MWRQ (Midwest Regional Office) • Zone 5 is SWRO (Southwest Regional Office) • Zone 6 is MPRO (Mountain Plains Regional Office) • Zone 7 is WRO (Western Regional Office) • Zone 8 is HQ (Headquarters)

Image: Create RA Organization (Address) Screen



5. Click Relationship (the **Relationship** tab) to assign relationships such as sub-orgs, plants, and ship-to locations to the RA.

Image: Create RA Organization (Relationship) Screen

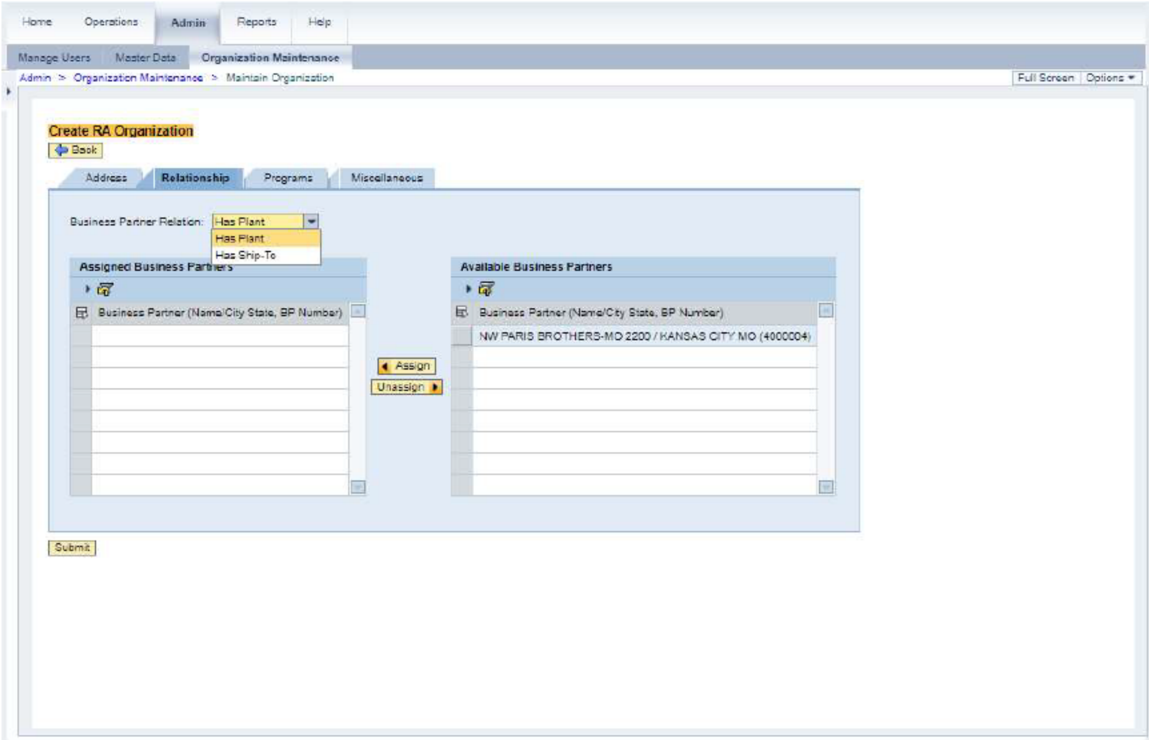


6. Click (the **Business Partner Relation** drop-down) to add business partner relations to the RA organization.

(Note) Select the **Has Plant** option when the business partner has a National Warehouse location that needs to be added. The options provided for possible National Warehouse locations are those assigned to the SDA.

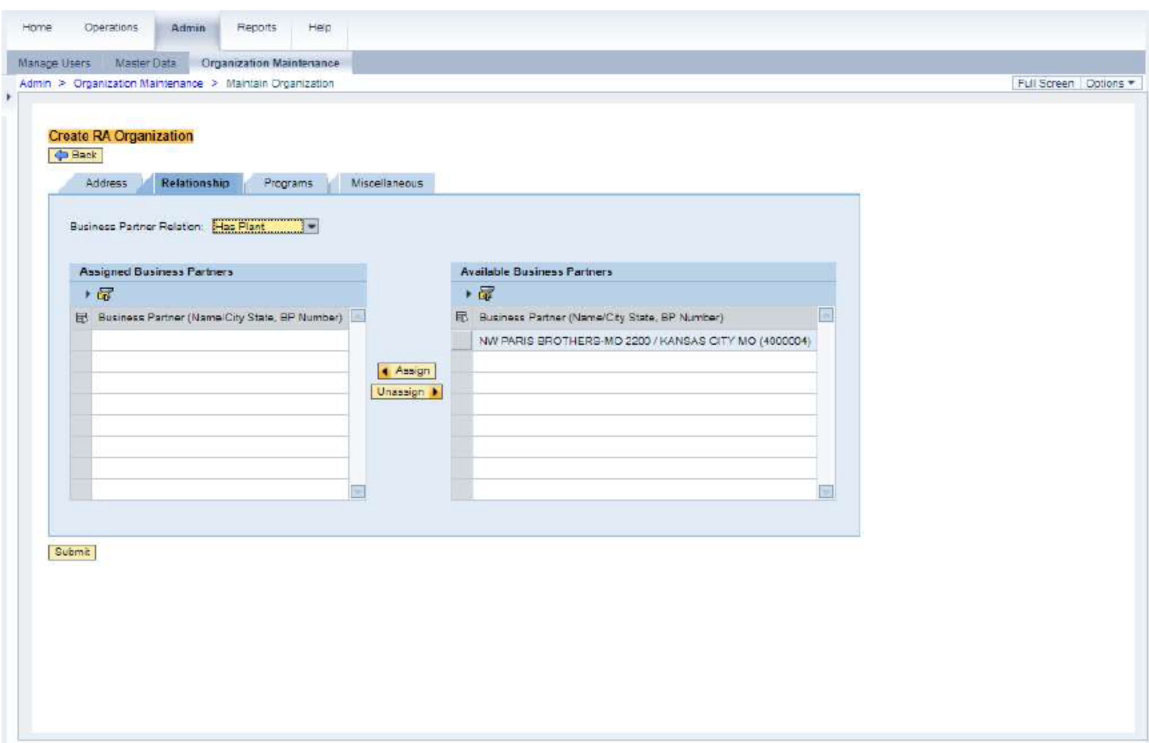
Select the **Has Ship-To** option when the business partner has a Ship-To location that needs to be added. This could include any delivery locations for goods. The addition of new Ship-To locations allows the RA to select the delivery location when creating a requisition.

Image: Create RA Organization (Relationship) Screen



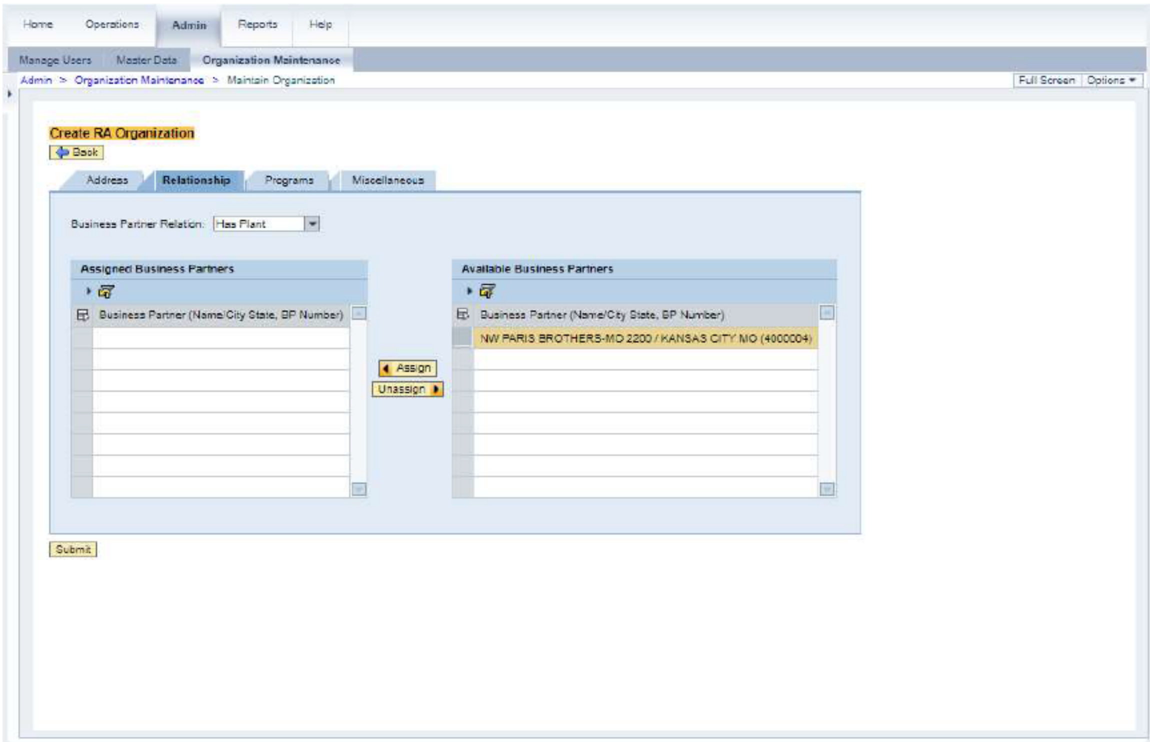
7. Select Has Plant (the **Has Plant** option) to assign plant locations to the RA.

Image: Create RA Organization (Relationship) Screen



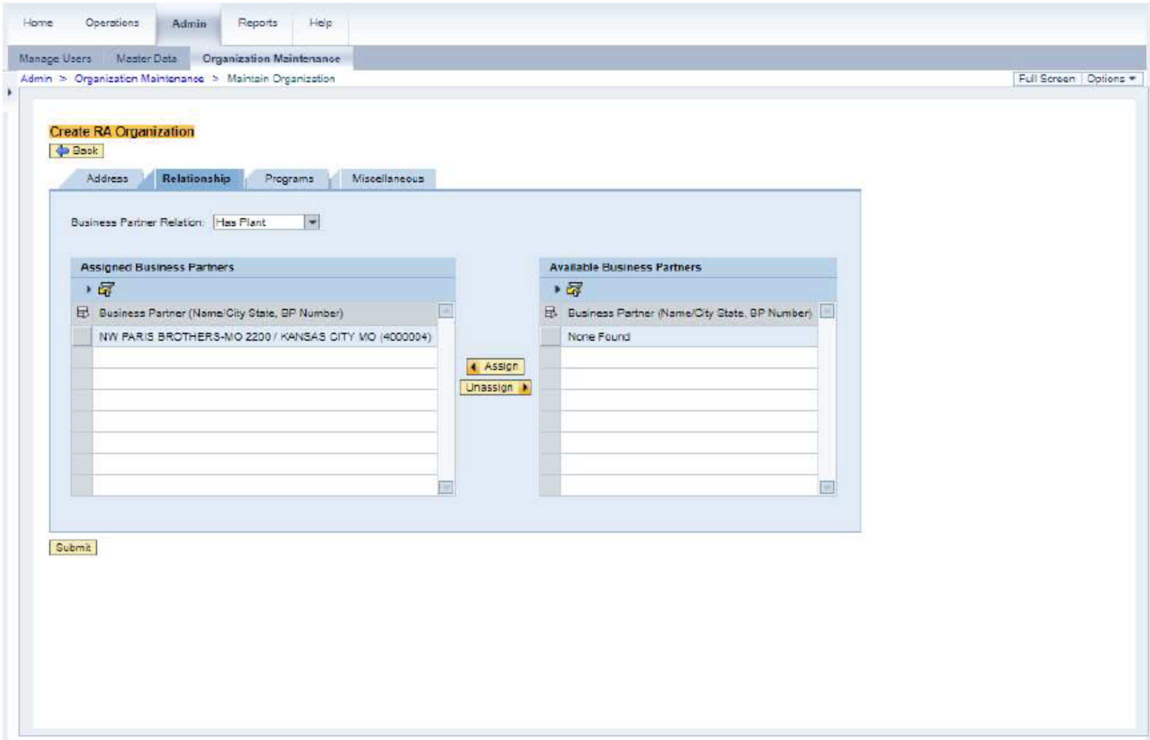
8. Click (the **Select** button) to assign a Business Partner from the *Available Business Partners* column. In this example, the Business Partner **NW PARIS BROTHERS-MO 2200 / KANSAS City MO (4000004)** is selected.

Image: Create RA Organization (Relationship) Screen



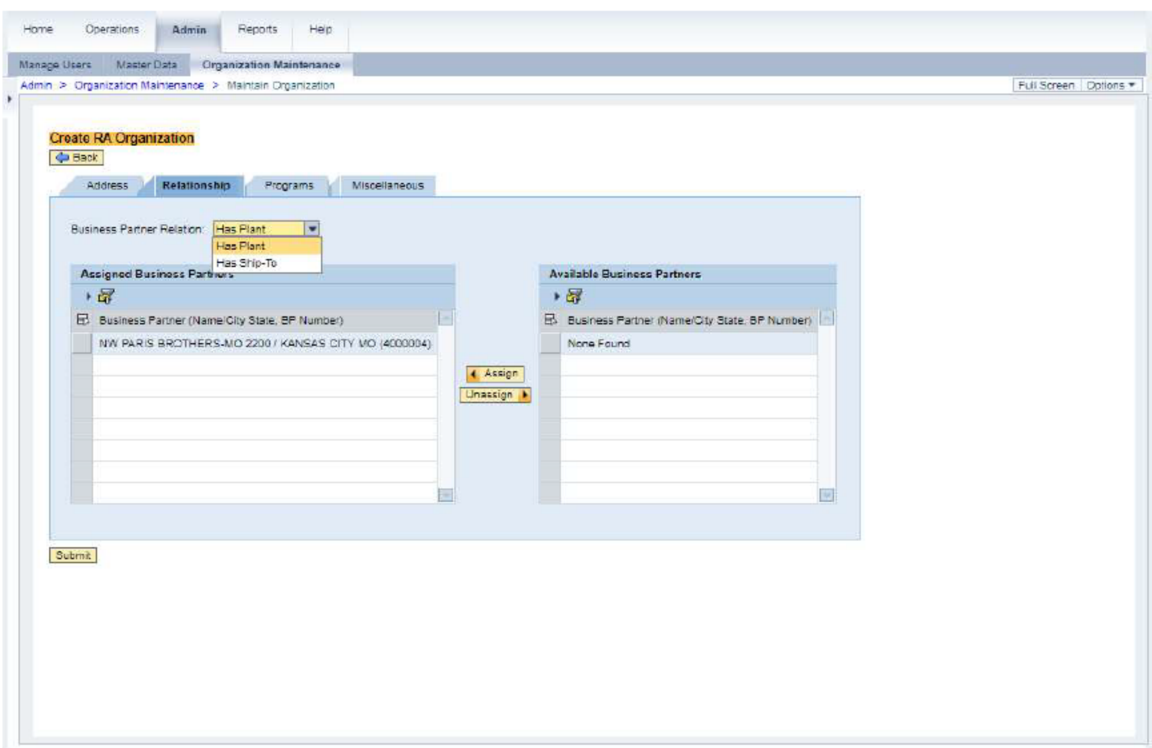
9. Click Assign (the **Assign** button) to assign the selection to the RA organization.

Image: Create RA Organization (Relationship) Screen



10. Click (the **Business Partner Relation** drop-down) to add business partner relations to the RA organization

Image: Create RA Organization (Relationship) Screen



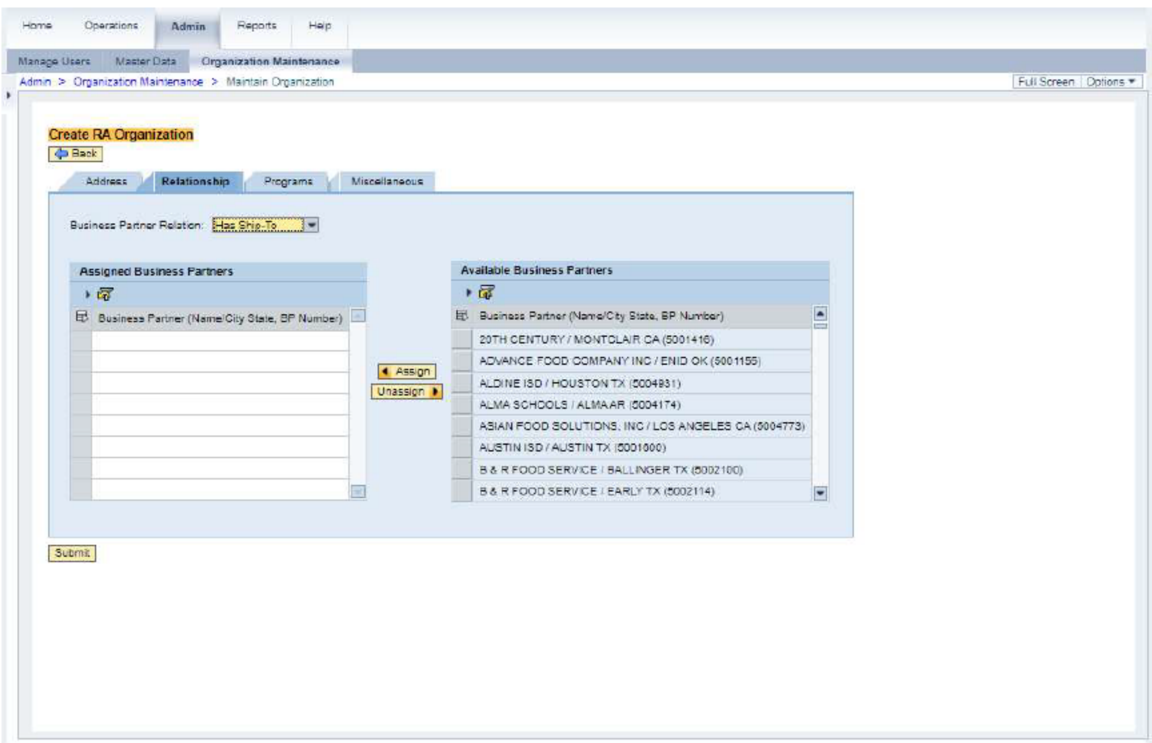
11. Select Has Ship-To (the **Has Ship-To** option) to assign Ship-To locations to the RA.

(Note) The Business Partners are listed in alphabetical order. Use the vertical scrolling to find the appropriate Business Partners. To select business partners:

- To select business partners from consecutive rows, hold down the **Shift** key and click the first and last **Select** buttons.
- To select business partners from non-consecutive rows, hold down the **Ctrl** key and click each **Select** button.
  The multiple selection also applies to the **Programs** tab.

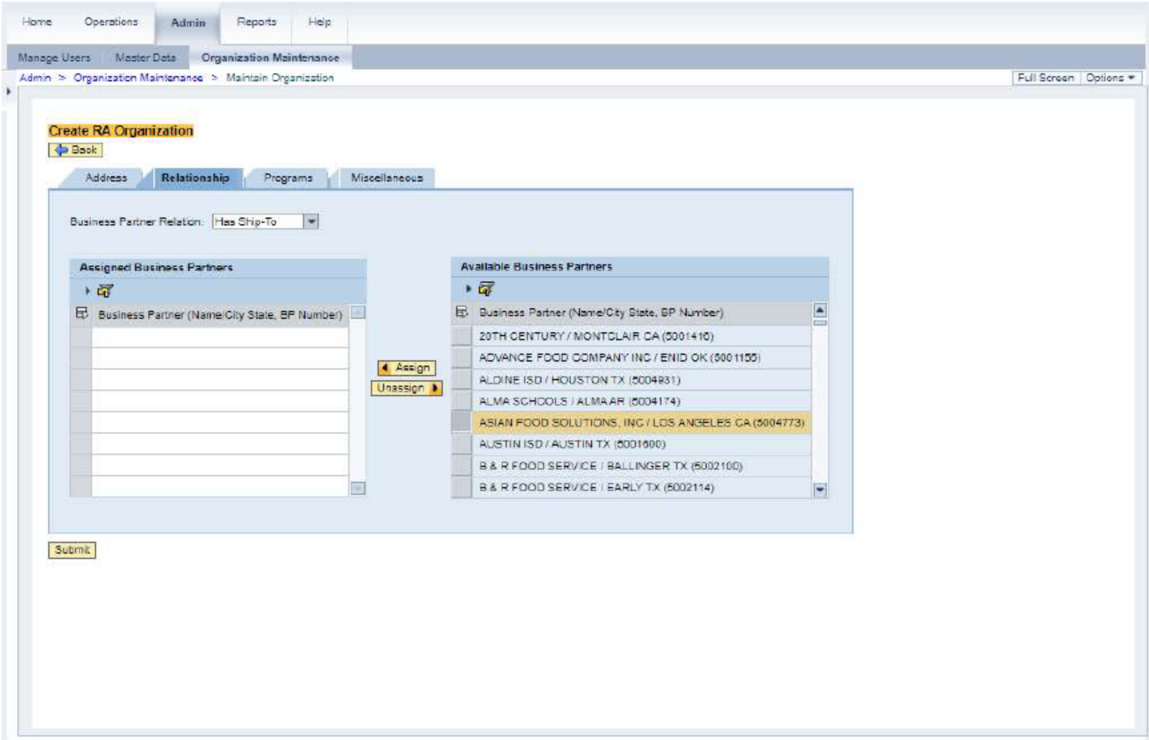
(Note) To filter the list of Business Partners, click on the column **Business Partner (Name/City State, BP Number)** field. Select (User-Defined Filter...) (the **User-Defined Filter...** option) and enter required criteria. Use * (the **Asterisk** symbol) at the beginning and end of a search term (e.g., *Craven* or *5001716*) to search for a Business Partner that contains the term. The asterisk searches part of a word as well (e.g., *Califor*). See also the Wildcard and Matchcode Searches job aid. To remove the filter, select the (**All**) option .

Image: Create RA Organization (Relationship) Screen



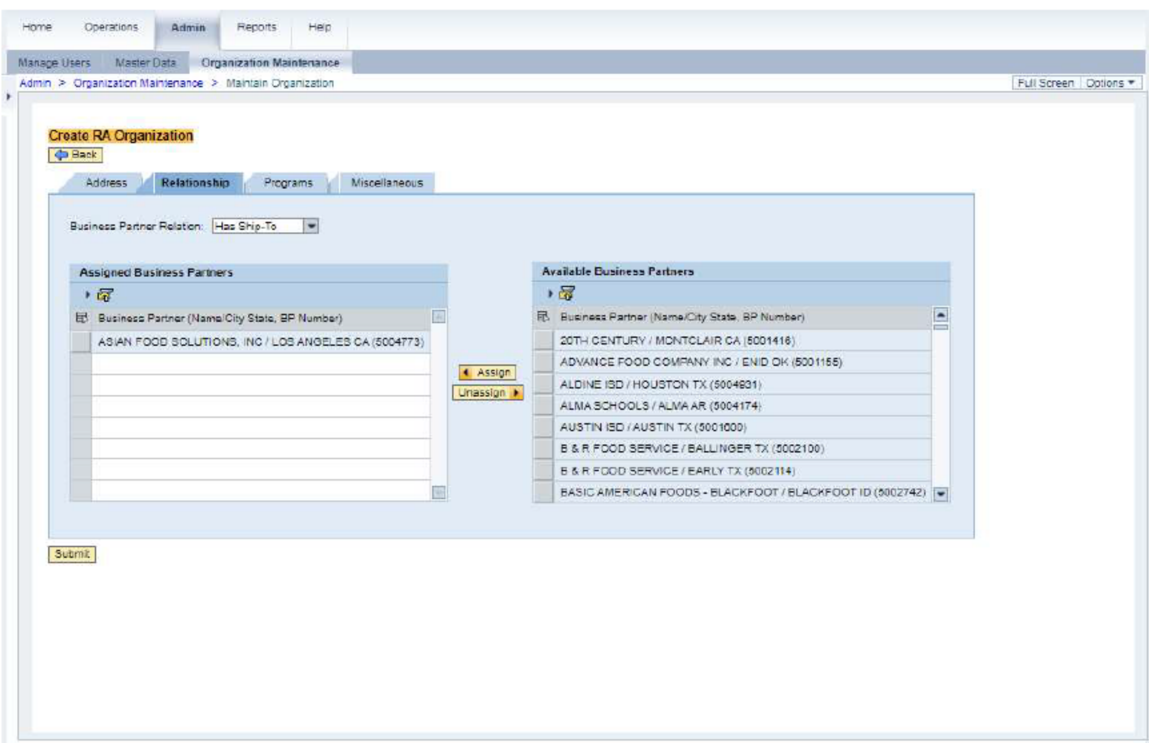
12. Click (the **Select** button) to assign a Business Partner from the *Available Business Partners* column. In this example, **ASIAN FOOD SOLUTIONS, INC / LOS ANGELES CA (5004773)** is selected.

Image: Create RA Organization (Relationship) Screen



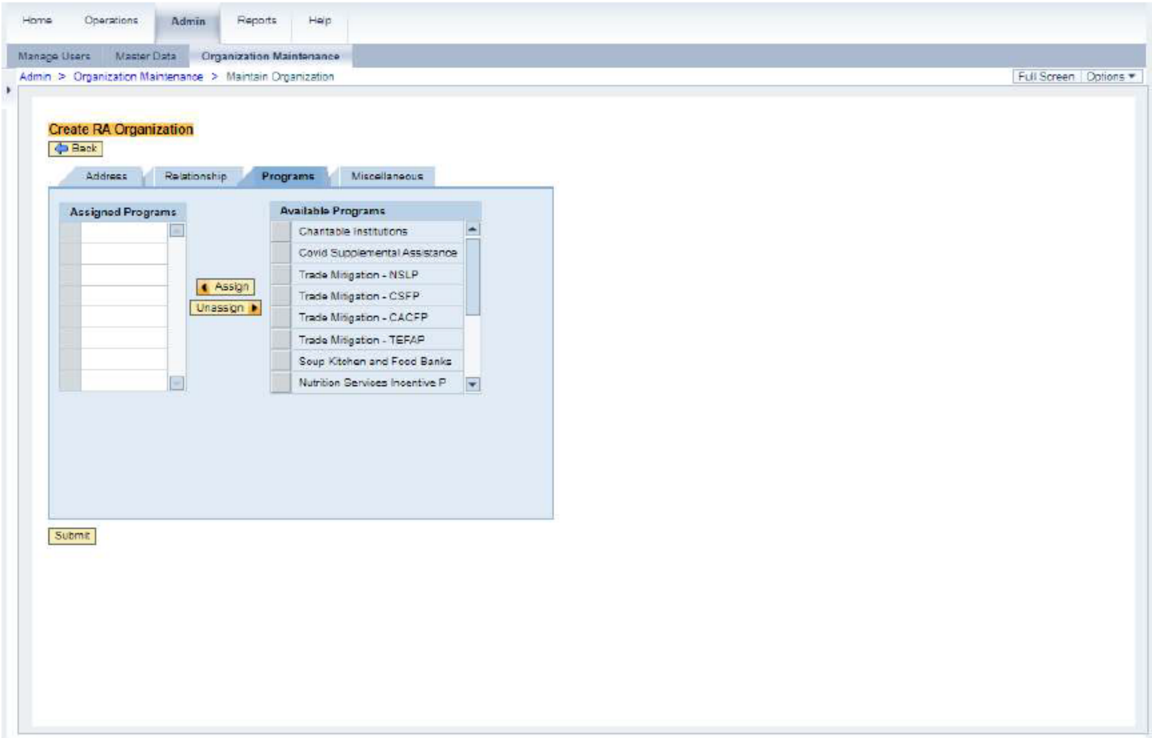
13. Click Assign (the **Assign** button) to assign the selection to the RA organization.

Image: Create RA Organization (Relationship) Screen



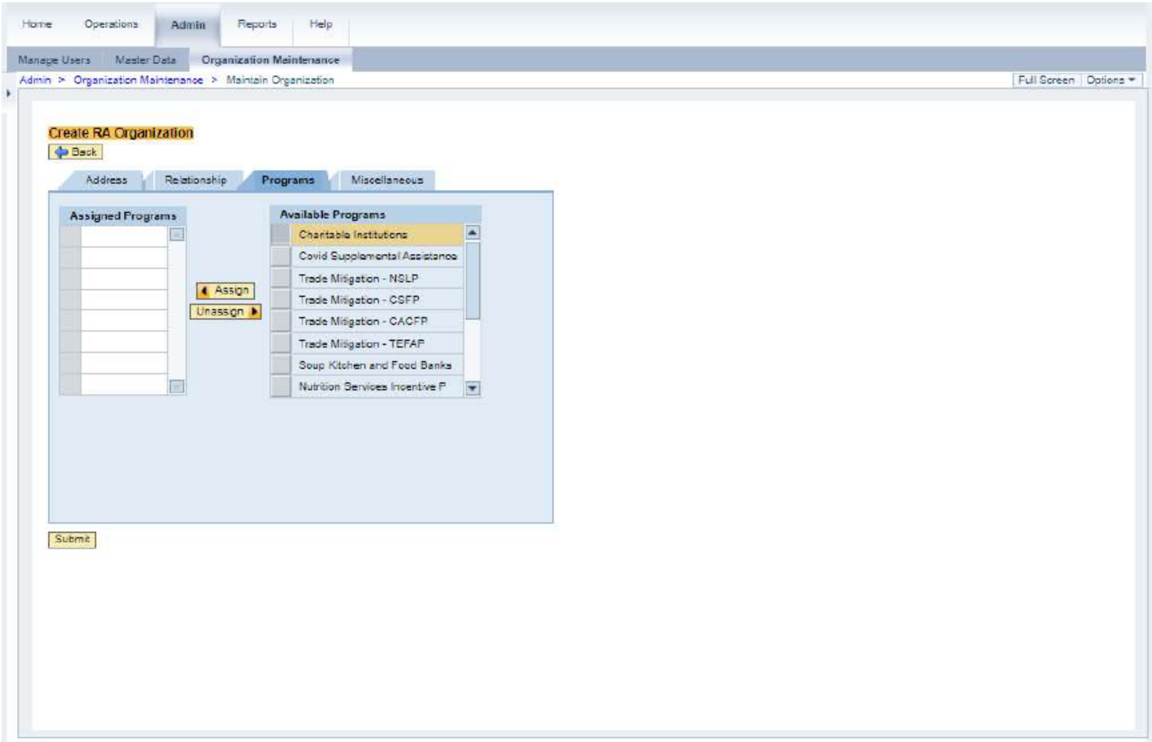
14. Click Programs (the **Programs** tab) to assign programs to the RA organization. Only programs assigned to the SDA by FNS can be assigned to the RA.

Image: Create RA Organization (Programs) Screen



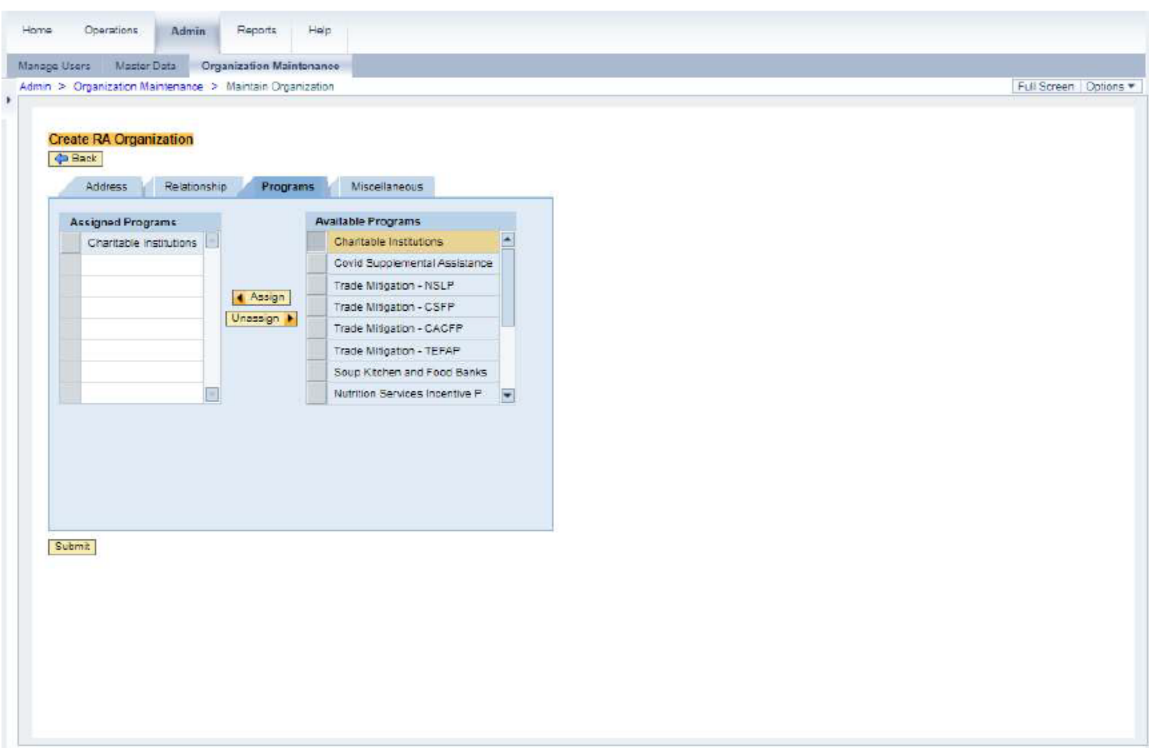
15. Click (the **Select** button) to assign a Program from the *Available Programs* column. In this example, **Charitable Institutions** is selected.

Image: Create RA Organization (Programs) Screen



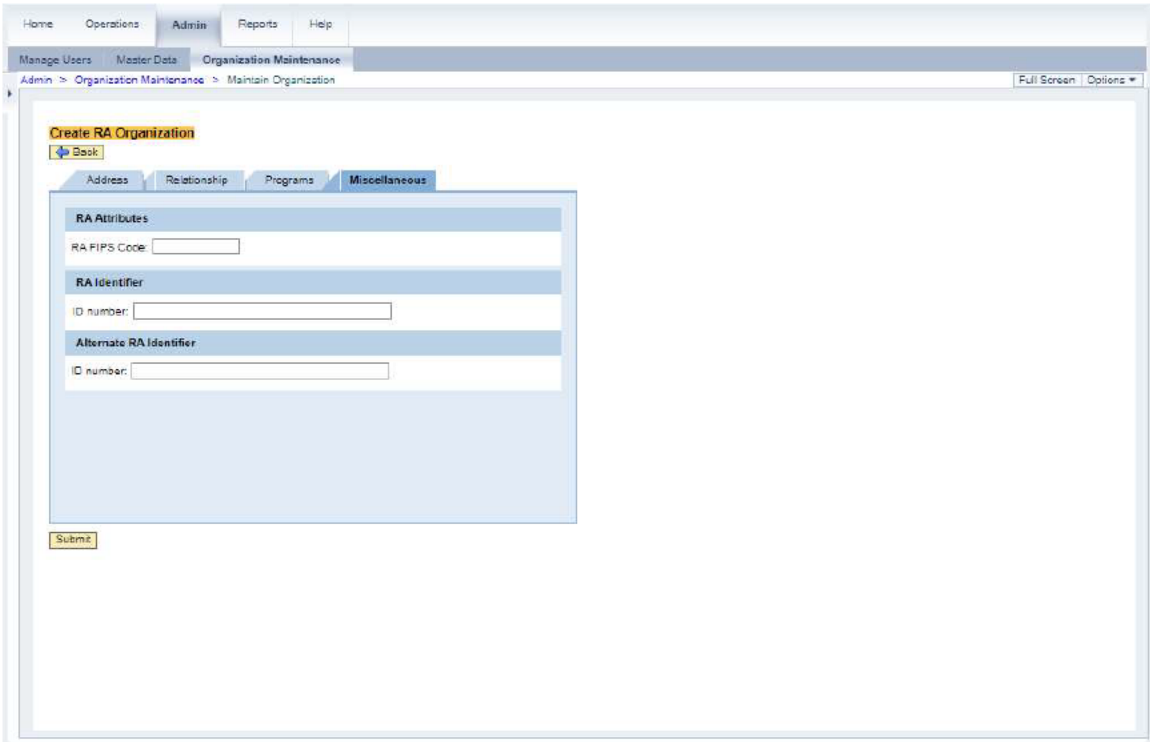
16. Click **Assign** (the **Assign** button) to assign the selection to the RA organization.

Image: Create RA Organization (Programs) Screen



17. Click Miscellaneous (the **Miscellaneous** tab) to enter identifiers for the RA organization.

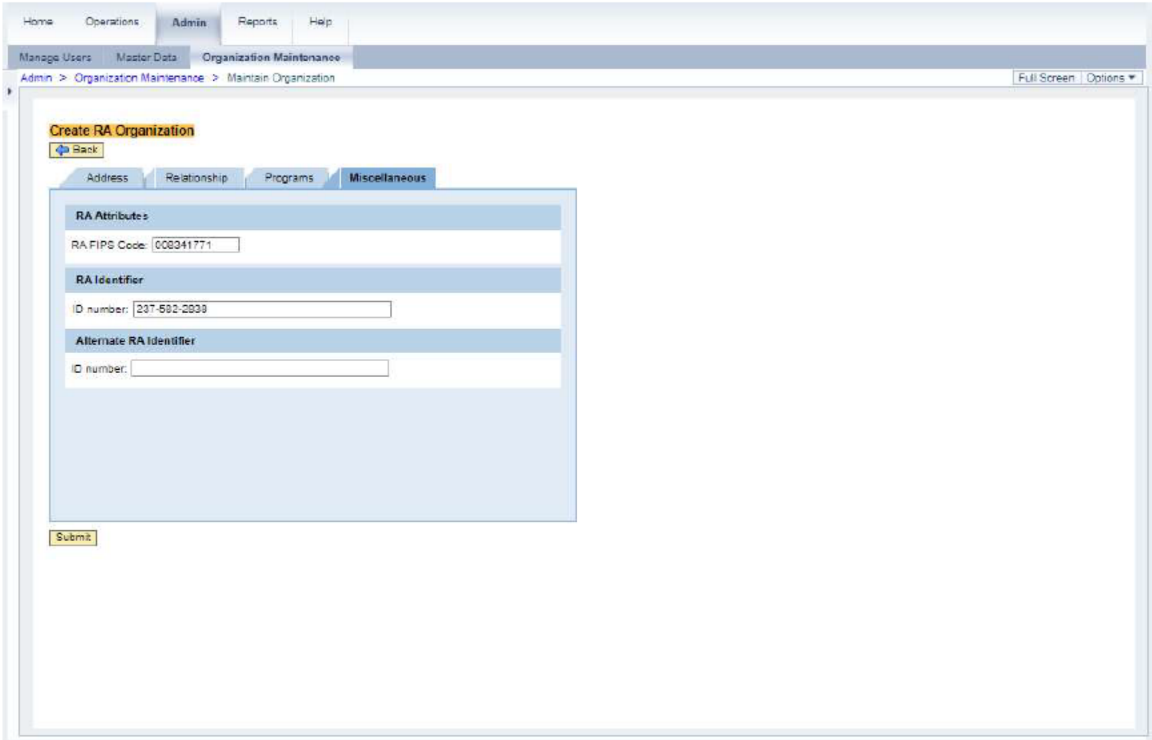
Image: Create RA Organization (Miscellaneous) Screen



18. As required, complete/review the following fields:

Field	R/O/C	Description
RA FIPS Code:	O	A unique code that is assigned to the recipient agency by the Federal government. **Example:** 008341771
ID Number: (RA Identifier)	O	Identification number that SDAs use to identify the RAs in other systems. **Example:** 237-562-2838
ID Number: (Alternate RA Identifier)	O	Additional identification number that SDAs use to identify RAs in other systems. (Note) The **ID Number** field in the *Alternate RA Identifier* section is optional. This field is available for SDAs to enter an alternate ID for the RA, if necessary. In this example, the field is left blank.

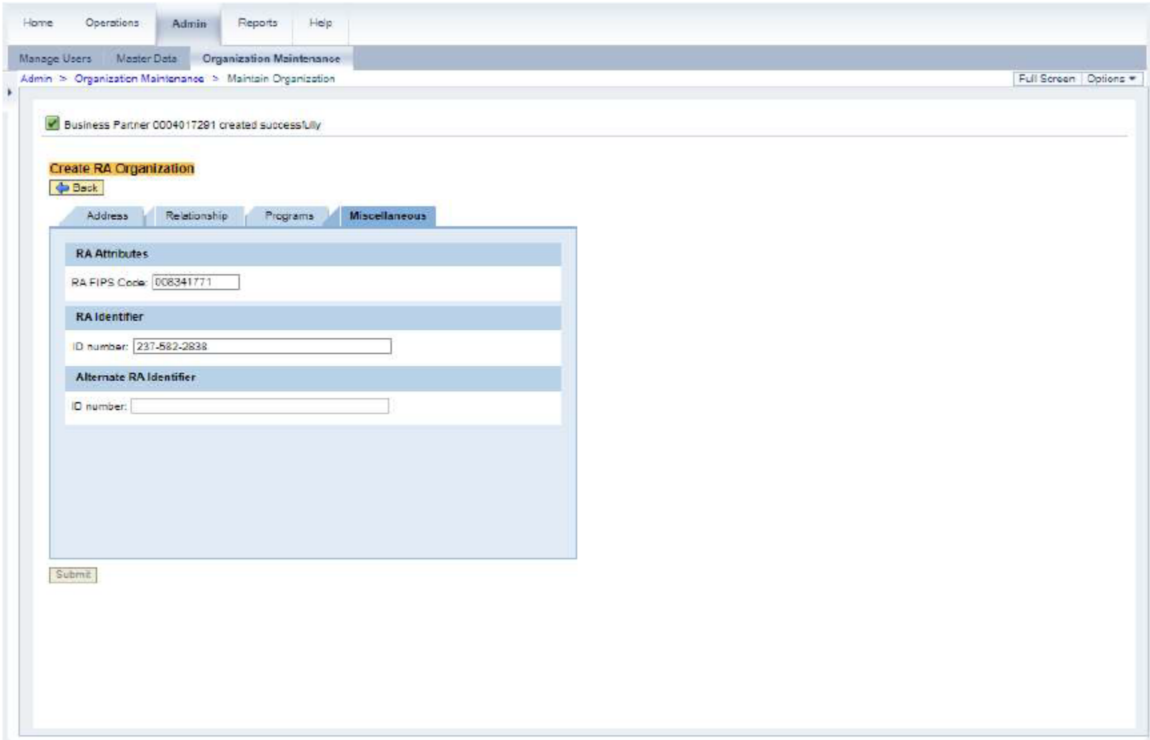
Image: Create RA Organization (Miscellaneous) Screen



19. Click Submit (the **Submit** button) to create the RA.

(Note) A confirmation message displays with the RA's Business Partner ID.

Image: Create RA Organization (Miscellaneous) Screen



20. The transaction is complete.

RESULT

An SDA has created a new RA organization with address, business partner assignments, and identification information in WBSCM.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for Organization (Org) and User Administrators (Admins) to create a new user in WBSCM. Admins will be able to create a new user and assign security roles in their organization or sub-organization as follows:

- Org Admins can create any user in their sub-organizations.
- User Admins can create or update users only in their own organization.

After following these steps to create a new user, the new user will receive instructions to set up a Login.gov ID and login to WBSCM using Login.gov. The new user will then be asked to accept the rules of behavior upon their initial login to WBSCM.

Process Trigger

Use this procedure to create a new user in WBSCM.

Prerequisites

- User performing this transaction must have the Org or User Admin role.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Manage Users** tab → **Manage Users** link to go to the *Manage Users* screen.

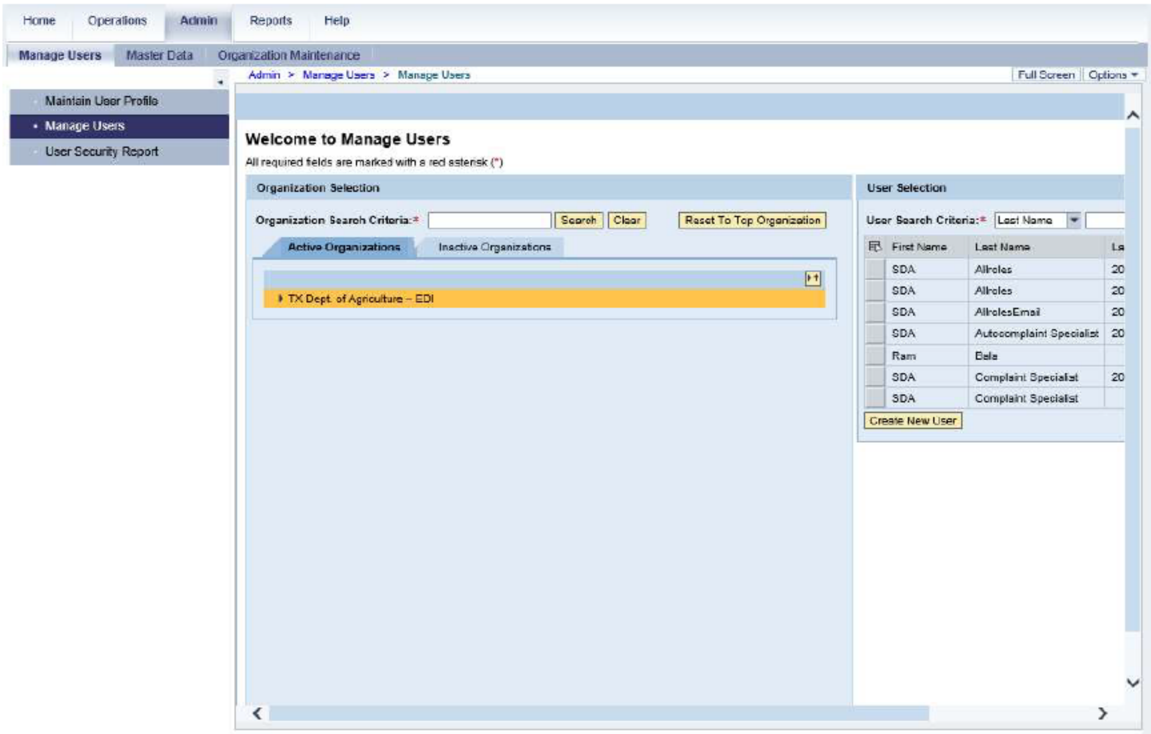
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
    - **Required (R)** – a mandatory field necessary to complete the transaction.
    - **Optional (O)** – a non-mandatory field not required to complete the transaction.
    - **Conditional (C) –** a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigational training and tips on creating favorites, performing searches, etc.
- If the user is a Corporate Vendor Administrator (CVA) and needs to create users for their own organization, refer to the *Create User (Vendor)* work instruction.
- Refer to the **WBSCM User Administration** job aid for an overview of the User Administration process.

PROCEDURE

1. Start the transaction using the following Portal path: **Admin** tab ➔ **Manage Users** tab ➔ **Manage Users** link.

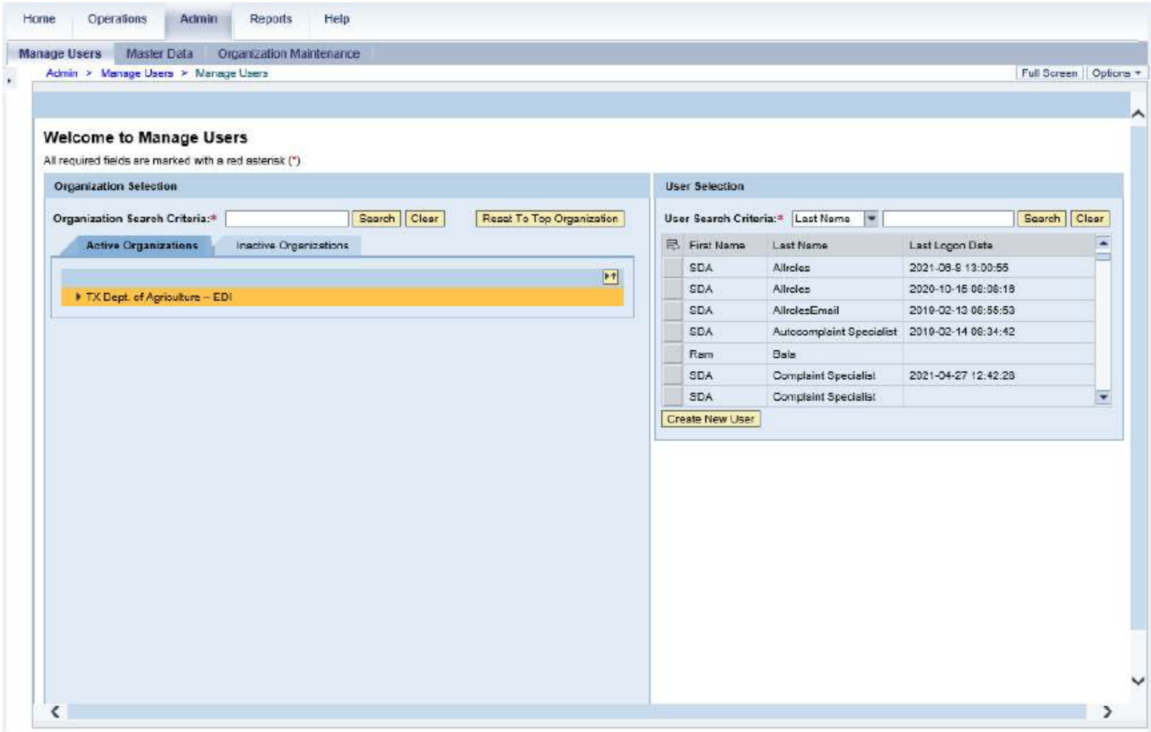
Image: Manage Users Screen



2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

(Note) The *Manage Users* screen content depends on the assigned role(s). For Org Admins, the organization and sub-organization(s) are listed in the *Organizations* panel on the left. For both Org Admins and User Admins, user details are listed in the *User Search* panel on the right.

Image: Manage Users Screen

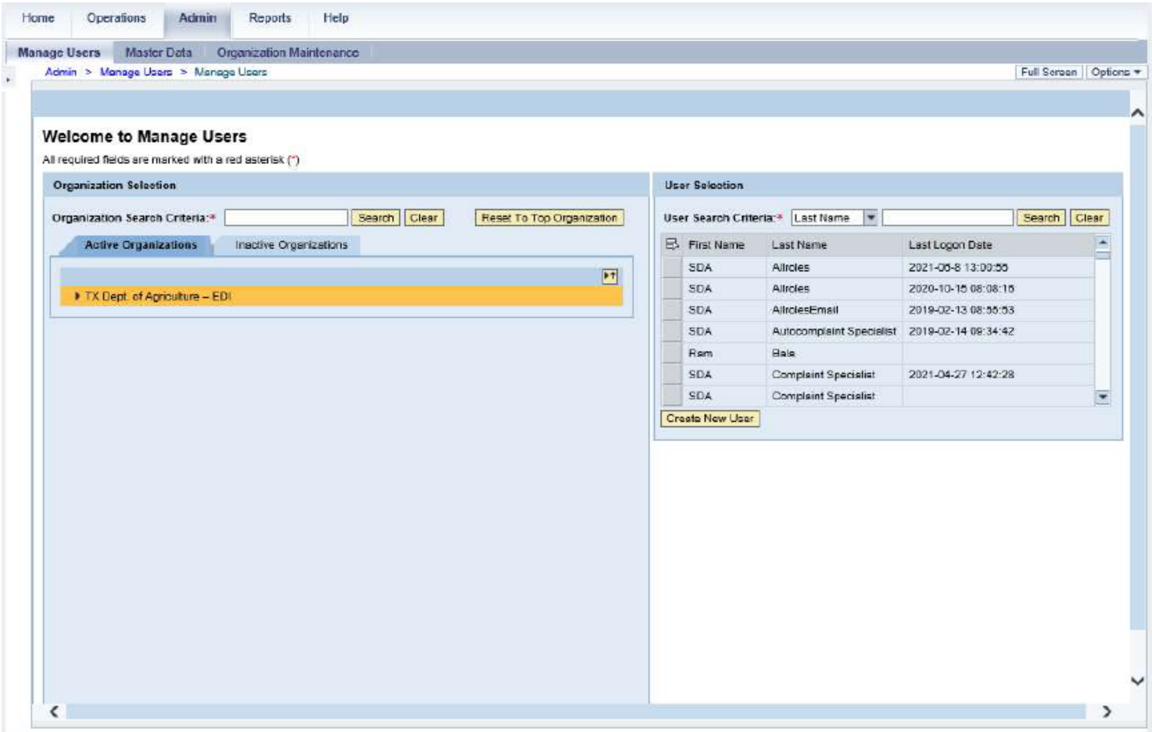


3. Perform one of the following:

If	Then
Admin needs to create a new user for a sub-organization.	Go to Step 4.
Admin needs to create a new user for own organization.	Go to Step 8.

(Note) Only an Org Admin for USDA agencies or SDAs/ITOs can create new users for their sub-organizations. Other Admins can create new users for their own organization only.

Image: Manage Users Screen



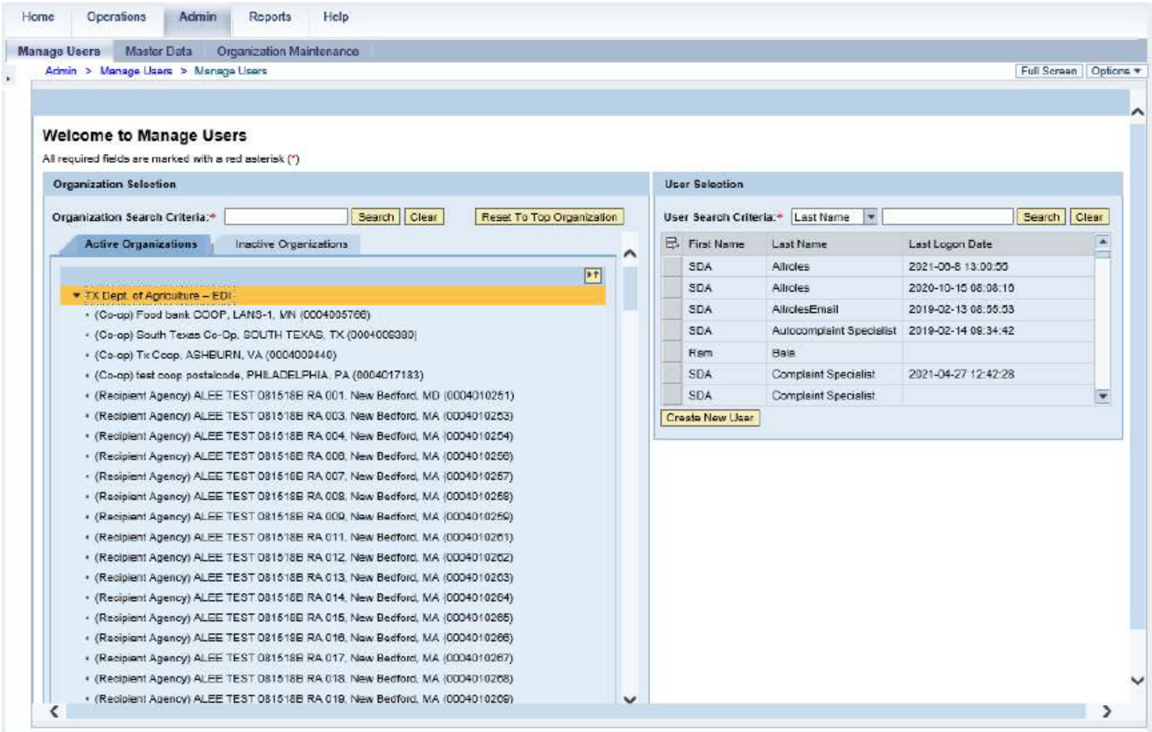
4. Click (the **Available Organizations** arrow) next to the tree item at the top of the *Organization Selection* panel.

(Note) The sub-organizations listed in the *Organizations Selection* panel for each type of organization include:

- **FSA -** Vendor and other sub-organizations (USAID, FAS, CPPAD, Private Voluntary Organizations (PVOs), Stevedores, and Freight Forwarders)
- **AMS -** Vendors
- **FNS -** Dom Ship-tos, HQ Receiver, National WH (Warehouses), SDA, and Third Party Barter (SEAM)
- **SDA -** Co-Ops and Recipient Agency
- **Co-Op -** Recipient Agency
- **Recipient Agency -** No sub-organizations
- **HQ Receivers -** Dom Ship-to
- **Dom Ship-to -** No sub-organizations
- **National WH -** No sub-organizations

(Note) In the *Organization Selection* panel, for each organization, the **Active Organizations** and **Inactive Organizations** tabs display is dependent on the sub-organization status. For example, if an organization only has active sub-organizations, then only the **Active Organizations** tab will display and the **Inactive Organizations** tab will be hidden. In this example, the organization has both active and inactive sub-organizations, therefore both **Active Organizations** and **Inactive Organizations** tabs are displayed.

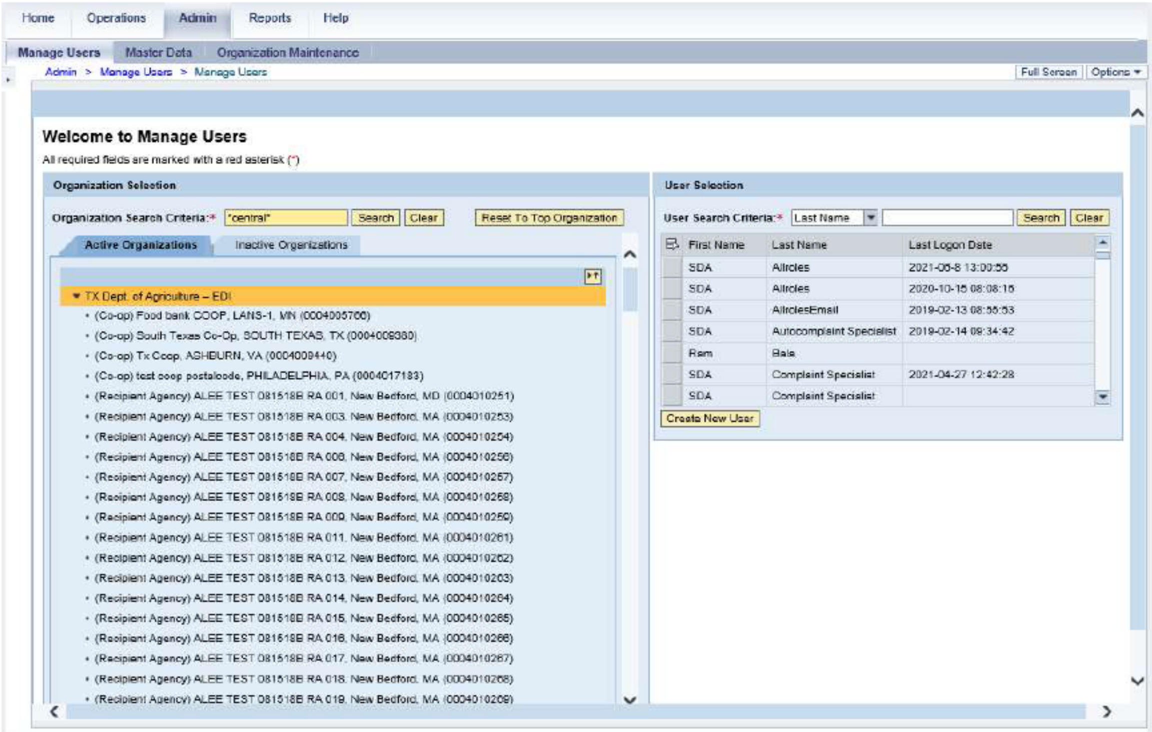
Image: Manage Users Screen



5. As required, complete/review the following fields:

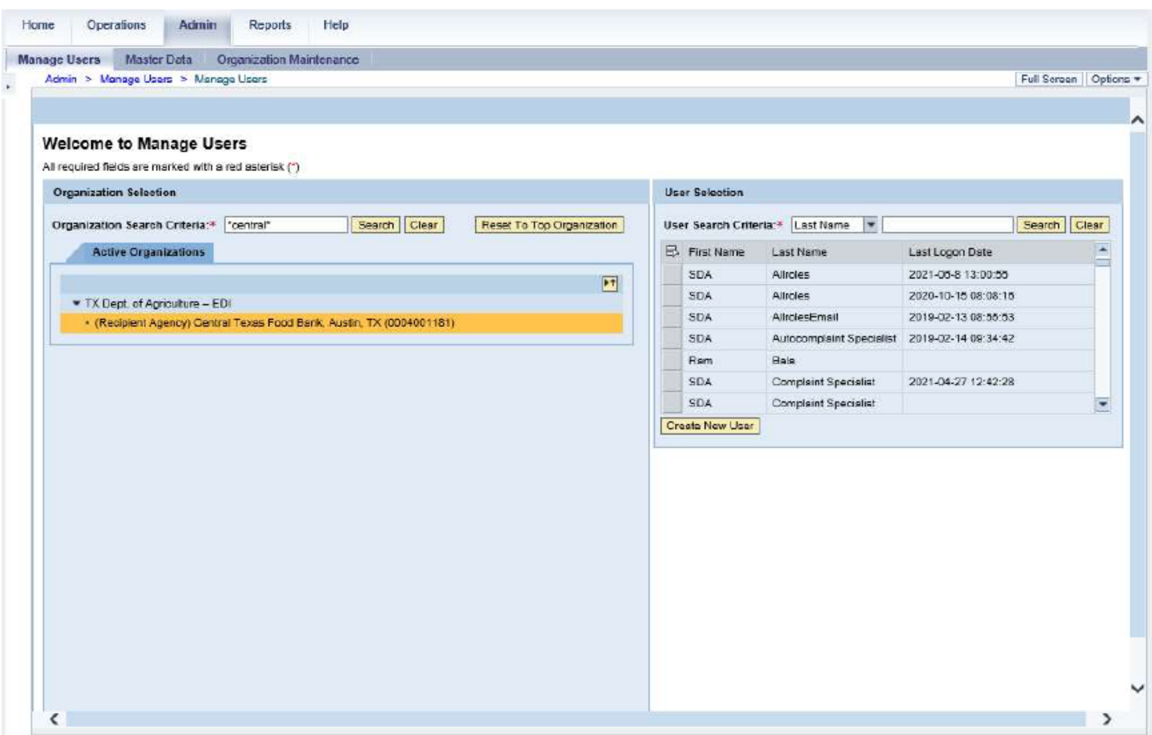
Field	R/O/C	Description
Organization Search Criteria	R	Field on a WBSCM screen used to define the criteria for a search. **Example:** *central* (Note) Use the wildcard symbol to search part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

Image: Manage Users Screen



6. Click Search (the **Search** button) to search for the matching sub-organization(s).

Image: Manage Users Screen



7. Select the appropriate sub-organization in the *Organization Selection* panel.

(Note) The users for the selected sub-organization will display in the *Users Search* panel.

(Note) Org Admins should confirm that the correct organization is selected in the *Organizations Selection* panel on the left. To return to the top-most organization, click Reset To Top Organization (the **Reset to Top Organization** button).

8. Perform one of the following:

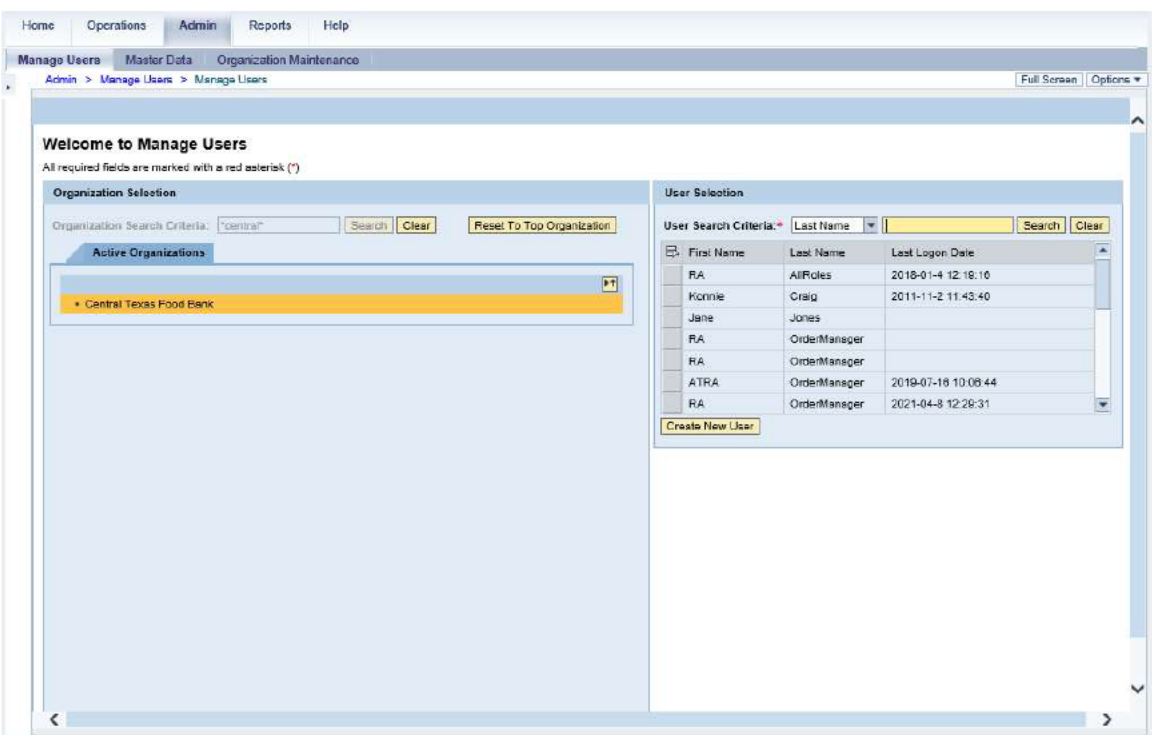
If	**Then**
Admin needs to search for an existing user by last name	Enter the Last name in the **User Search Criteria** field. Last Name (the **Last Name** option) is the default option.
Admin needs to search for an existing user by first name	Click First Name (the **First Name** option) from the **User Search Criteria** drop-down.

(Note) In this example, the **Central Texas Food Bank** has an active organization; therefore only the **Active Organizations** tab displays.

(Note) To prevent creating duplicate user profiles for the same person, always perform a user search to ensure that a user profile does not already exist in WBSCM.

(Note) **Last Name** is the default option for the **User Search Criteria** field. The user can select the **First Name** as a search option by clicking on (the **drop-down** arrow) and select **First Name** from the option list. In this example, **Last Name** is used.

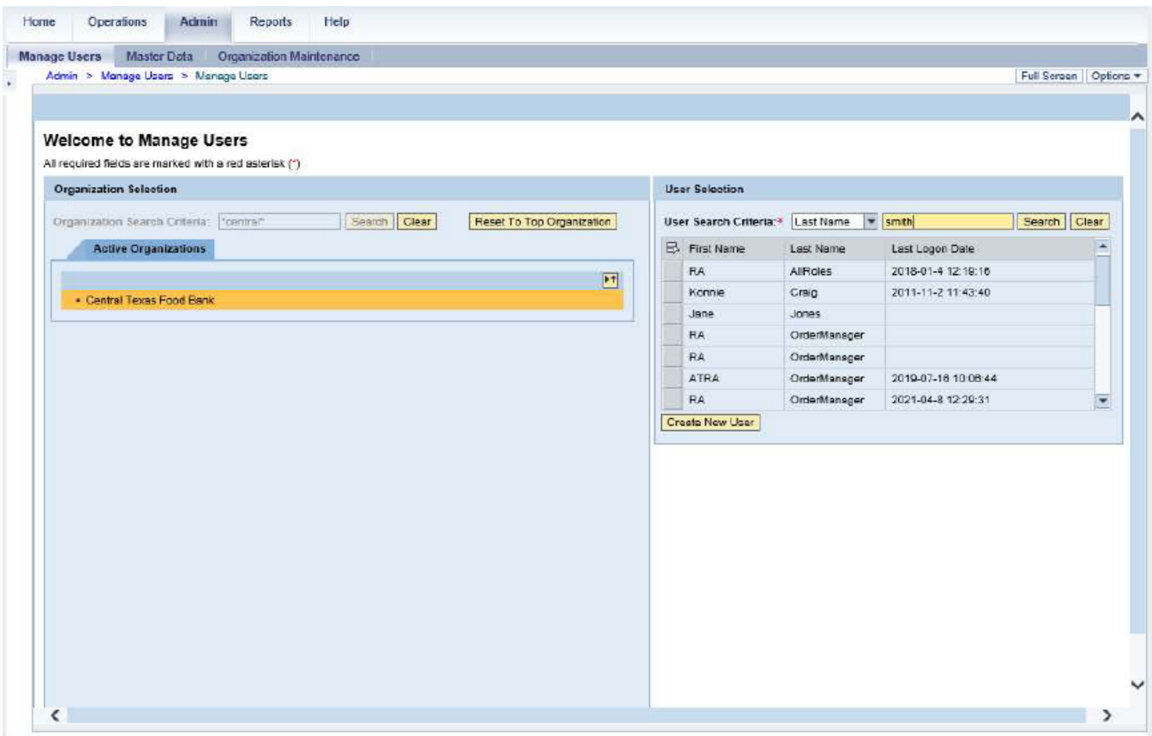
Image: Manage Users Screen



9. As required, complete/review the following fields:

Field	R/O/C	Description
User Search Criteria: (Value)	R	First name or last name of the user to locate. **Example:** smith (Note) Enter the name or use the wildcard symbol to match part of the name. Refer to the *Wildcard and Matchcode Searches* job aid for guidance on partial match searches.

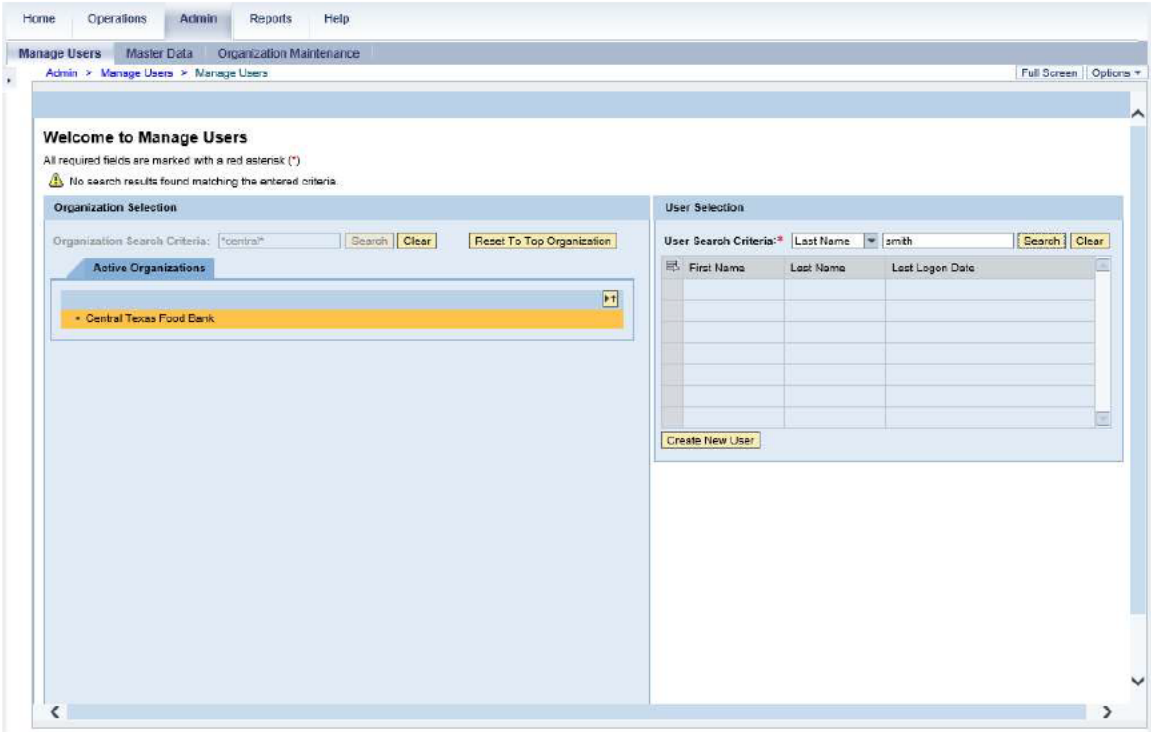
Image: Manage Users Screen



10. Click Search (the **Search** button) to check for matching user profile(s) in WBSCM.

(Note) If the user already exists for the selected organization, do not continue with the steps to create a new user. Refer to the *Display and Maintain User* work instruction for guidance on reviewing and updating the existing user profile, as needed.

Image: Manage Users Screen

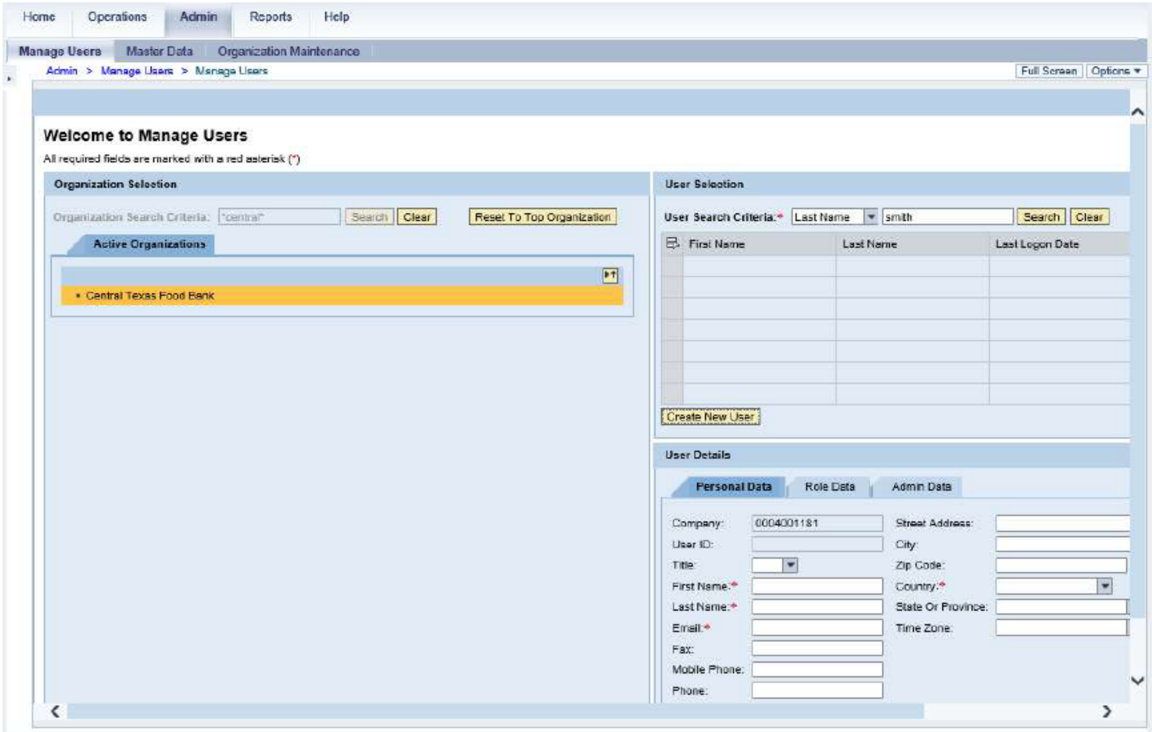


11. Click Create New User (the **Create New User** button) to create a new user ID.

(Note) In this example, as the message of the search is "*No search results found matching the entered criteria*." the new user can be created as it does not already exist in the system.

(Note) The *User Details* panel displays.

Image: Manage Users Screen



12. As required, complete/review the following fields:

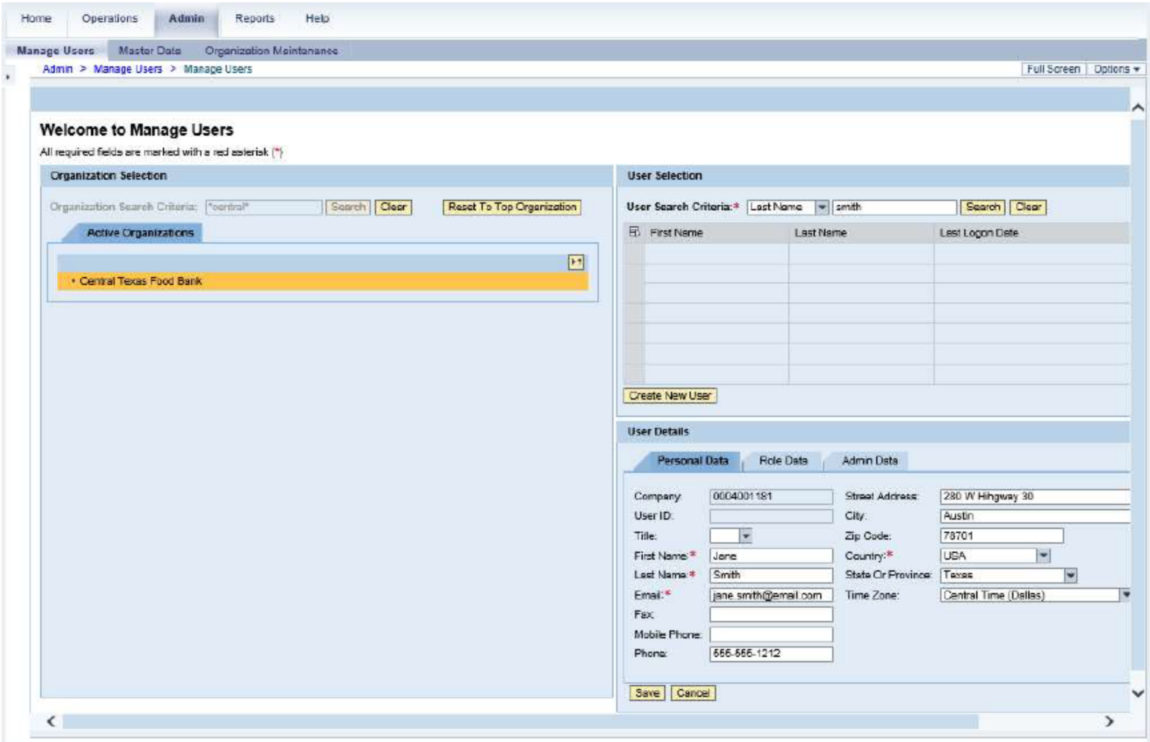
Field	R/O/C	Description
Company:	C	Numeric code assigned by the system for organization. **Example:** 0004001181 (Note) System generated business partner number
User ID:	C	Identification assigned to a user. (Note) The system will create the User ID after the record is saved.
Title:	O	A heading used before a surname or full name. (Note) Use (the **Drop-down** arrow) in the field to select the title.
First Name:	R	First name of the user. **Example:** Jane

Field	R/O/C	Description
Last Name:	R	Last name of the user. **Example:** Smith
Email:	C	Email address for the user or organization. **Example:** jane.smith@email.com (Note) This is the email address where the new registration email will be sent. The new user must have access to this email account.
Fax:	O	Fax number for the user or organization.
Mobile Phone:	O	Cellular phone number where the user or organization can be reached.
Phone:	O	Phone number for user or organization.
Street Address:	R	A free text field in which to enter the street address of the user or organization. **Example:** 280 W Highway 30
City:	R	City where the user or company is located. **Example:** Austin
Zip code:	R	Zip code for the location of the user or organization. **Example:** 78701 (Note) Zip code is required even though it is not marked with a red asterisk. If the user leaves this field blank or enters the zip code in incorrect format, an error

Field	R/O/C	Description
		will occur and the entry will need to be corrected before the user can be created.
Country:	R	Country code that represents country name. **Example:** USA (Note) Use (the **Drop-down** arrow) in the field to select the country.
State or Province:	R	State where the user or organization is located. **Example:** Texas (Note) Use (the **Drop-down** arrow) in the field to select the country.
Time Zone:	O	Standard time for a region throughout the world. **Example:** Central Time (Dallas) (Note) Use (the **Drop-down** arrow) in the field to select the country.

(Note) As a best practice, Admins should populate all known fields on the *Personal Data* tab.

Image: Manage Users Screen

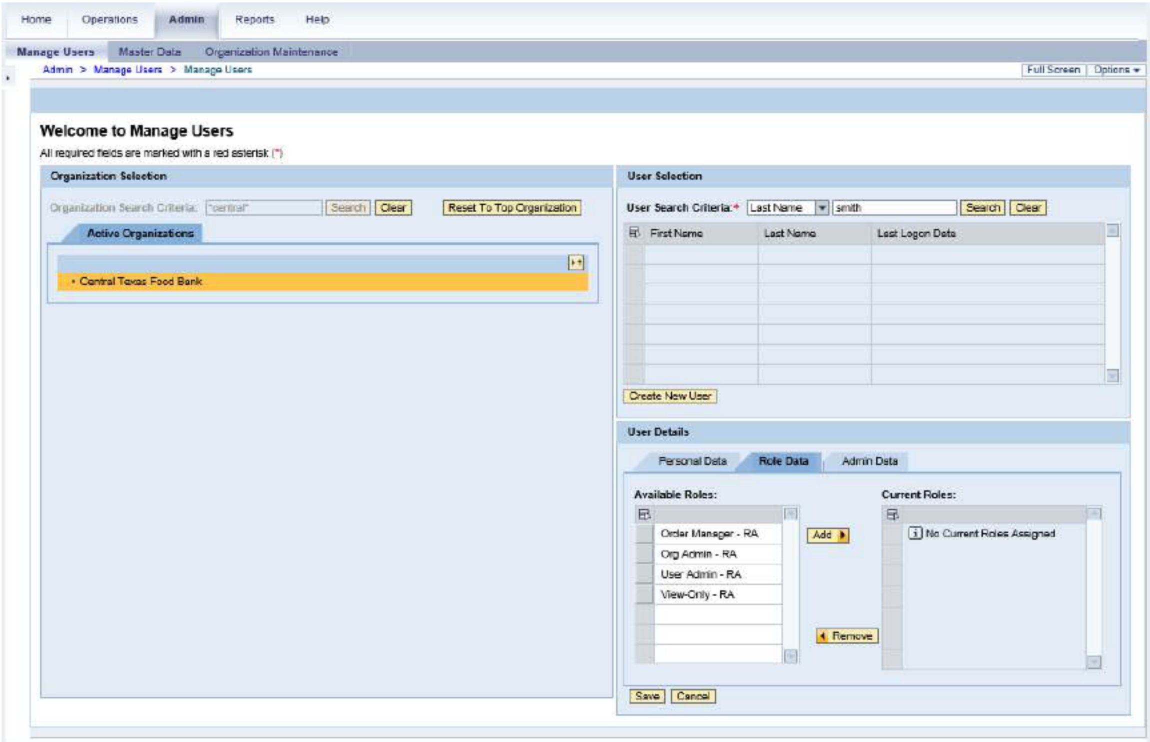


13. Click Role Data (the **Role Data** tab) to select roles for the new user.

(Note) The *Role Data* tab displays two columns that contain the following details:

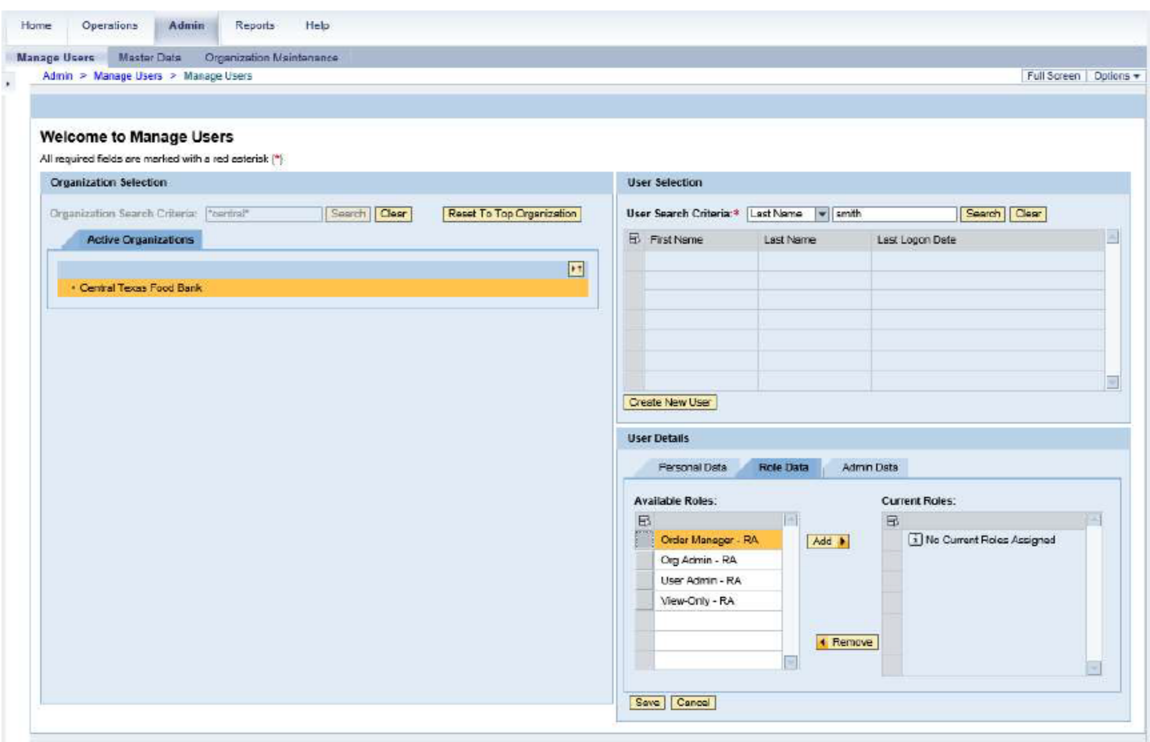
- **Available Roles -** All roles available, but not yet assigned, based on the new user's organization. Note that different roles are available for each type of organization; refer to the *WBSCM Role Assignment Matrix* job aid for more information.
- **Current Roles -** All roles currently assigned to the new user.

Image: Manage Users Screen



14. Click (the **Selection** button) next to a role to be assigned to the new user in the *Available Roles* column. In this example, the **Order Manager - RA** role is selected.

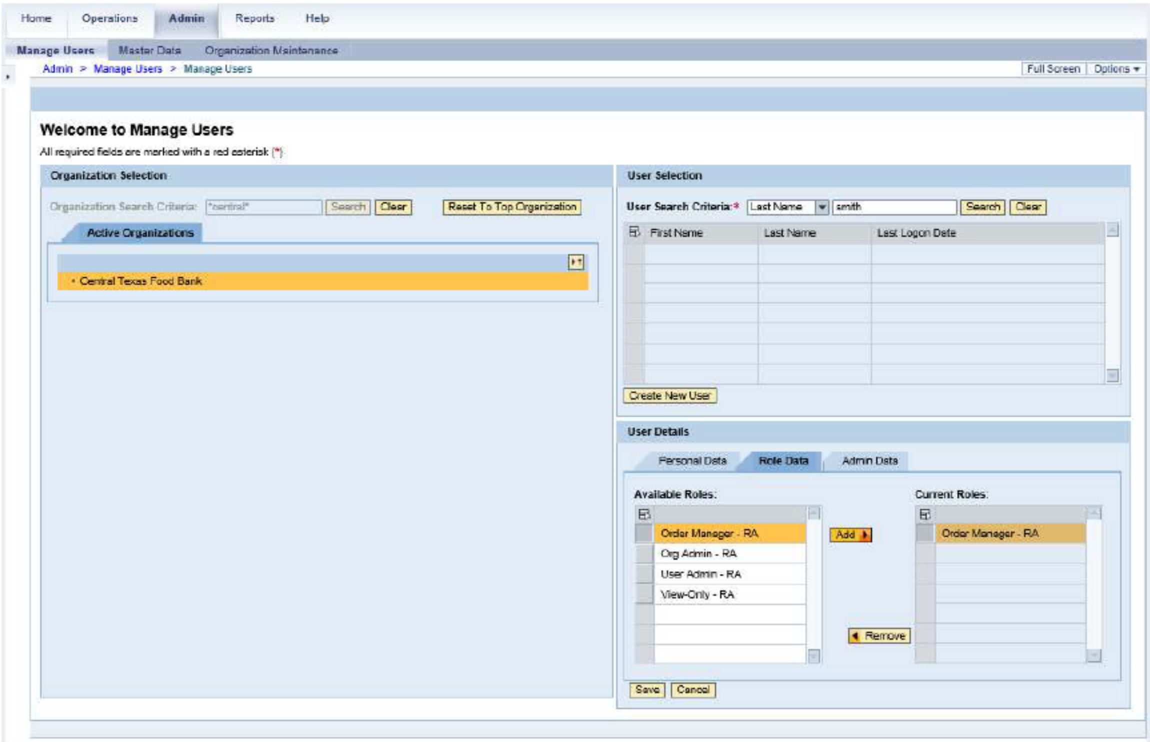
Image: Manage Users Screen



15. Click Add (the **Add** button) to assign the selected role, which will appear in the *Current Roles* column.

16. Repeat steps 14 and 15 to assign each additional role, as needed.

Image: Manage Users Screen

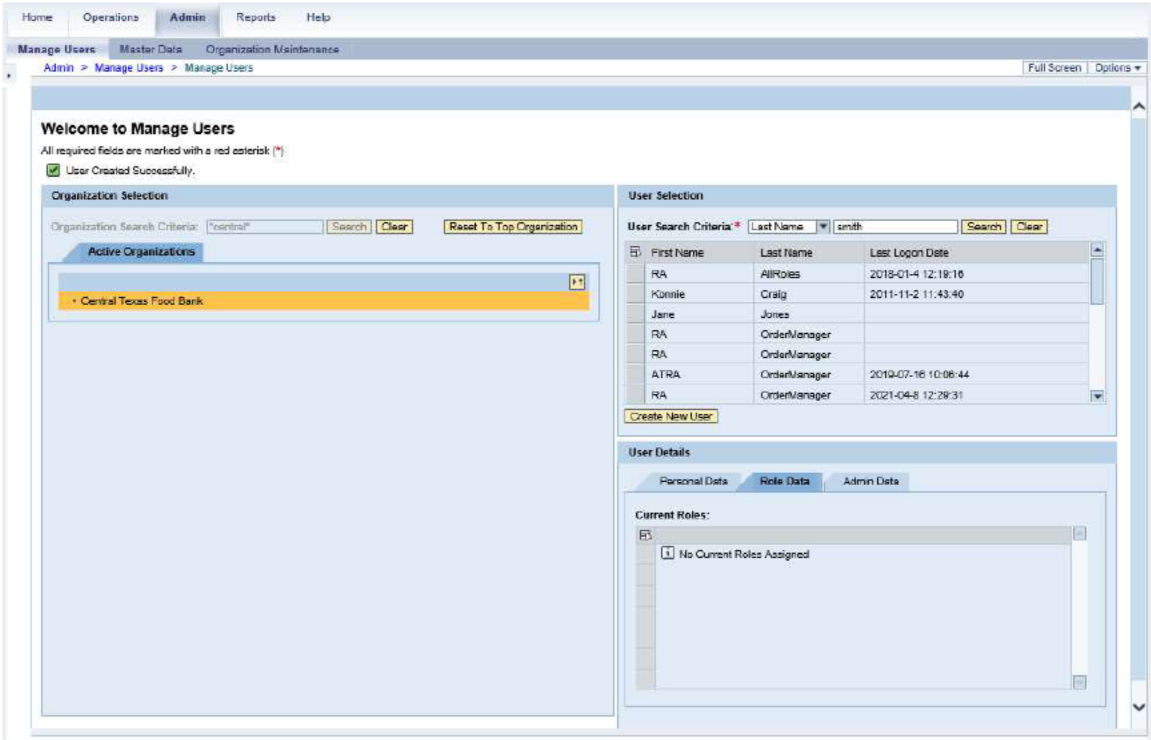


17. Click Save (the **Save** button) to save the new user.

(Note) The system displays a message "User Created Successfully".

(Note) Refer to the User Security Report job aid to review a list of created users and perform any required analysis.

Image: Manage Users Screen



18. The transaction is complete.

RESULT

A new user profile has been created in WBSCM. The new user will receive an email with instructions to set up a Login.gov ID. After completing the steps described in the registration email, the new user will be able to access WBSCM. Guide new user to the USDA WBSCM page for additional instructions and tutorials describing the WBSCM registration process.