



## Process Overview

### Purpose

The purpose of this transaction is for User Administrators to create a new user in WBSCM. Using this procedure, a User Administrator will be able to enter the new user's contact information and assign security roles to the user. After following these steps to create a new user, the new user will receive an email asking that individual to set up an eAuth account and login using eAuth. The new user will then be asked to accept the rules of behavior upon their initial login into WBSCM.

### Process Trigger

Use this procedure when you need to create a new user in WBSCM.

### Prerequisites

- None.

### 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.
  - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An **Optional field**: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

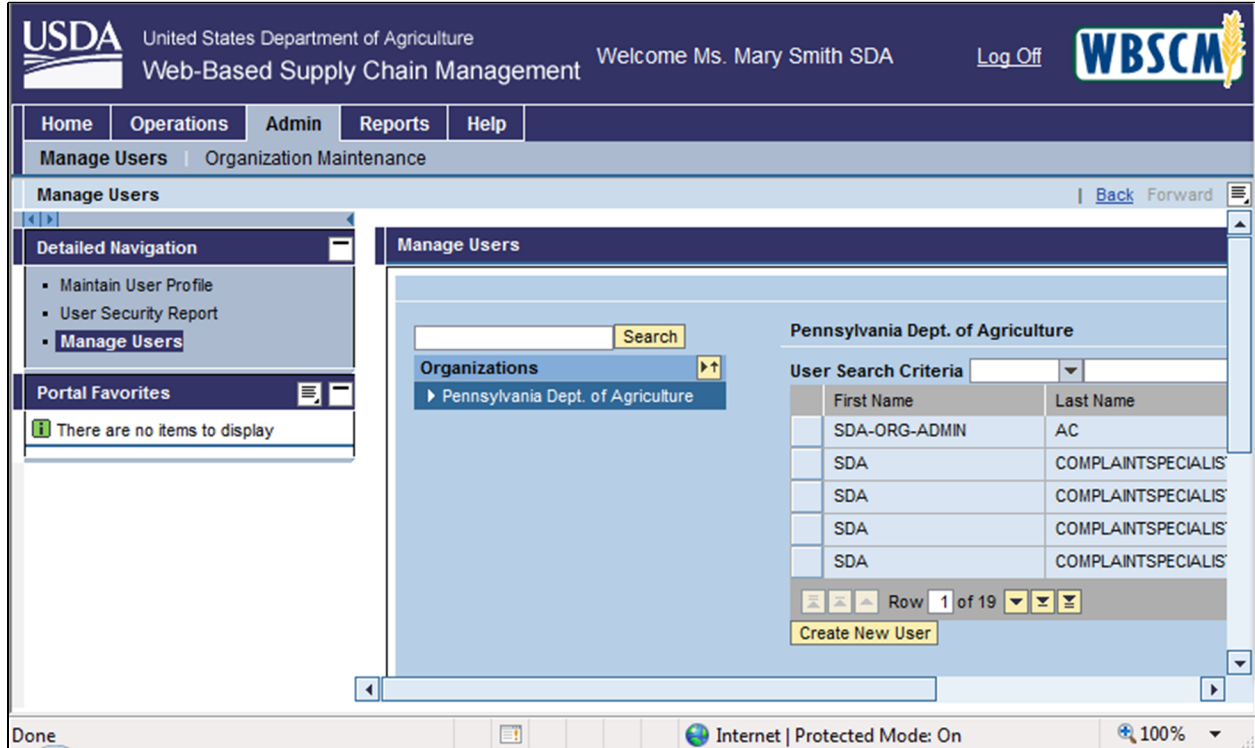
### Reminders

- Remember to check your work
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.

## Procedure

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

### Manage Users Screen



USDA United States Department of Agriculture  
Web-Based Supply Chain Management Welcome Ms. Mary Smith SDA Log Off WBSCM

Home Operations Admin Reports Help

Manage Users Organization Maintenance

Manage Users | Back Forward

Detailed Navigation

- Maintain User Profile
- User Security Report
- Manage Users

Portal Favorites

There are no items to display

Manage Users

Search

Organizations

- Pennsylvania Dept. of Agriculture

Pennsylvania Dept. of Agriculture


User Search Criteria

First Name	Last Name
SDA-ORG-ADMIN	AC
SDA	COMPLAINTSPECIALIS
SDA	COMPLAINTSPECIALIS
SDA	COMPLAINTSPECIALIS
SDA	COMPLAINTSPECIALIS

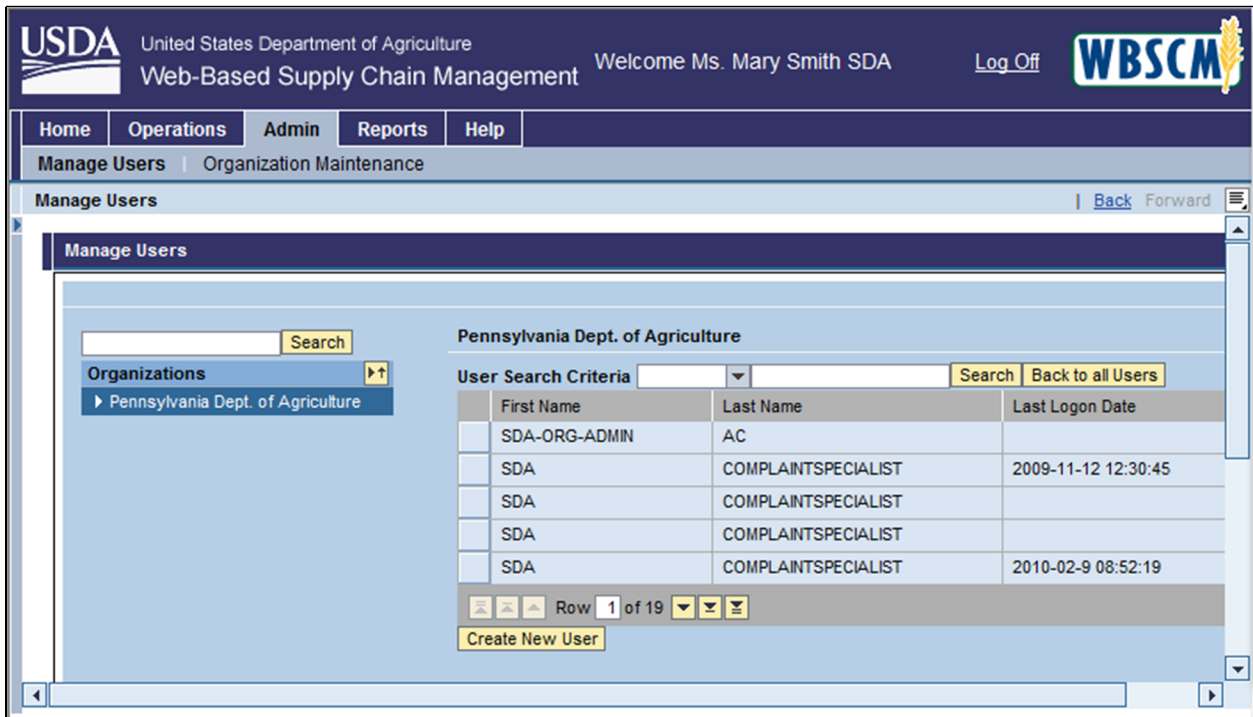
Row 1 of 19

Create New User

Done Internet | Protected Mode: On 100%

2. Click  (the **Hide Navigator** button) to hide the Portal menu. This can be done in all WBSCM transactions - not just user management transactions.

## Manage Users Screen



The screenshot shows the 'Manage Users' screen for the 'Pennsylvania Dept. of Agriculture' organization. The page includes a search bar, a list of organizations, and a table of users. The table has the following data:

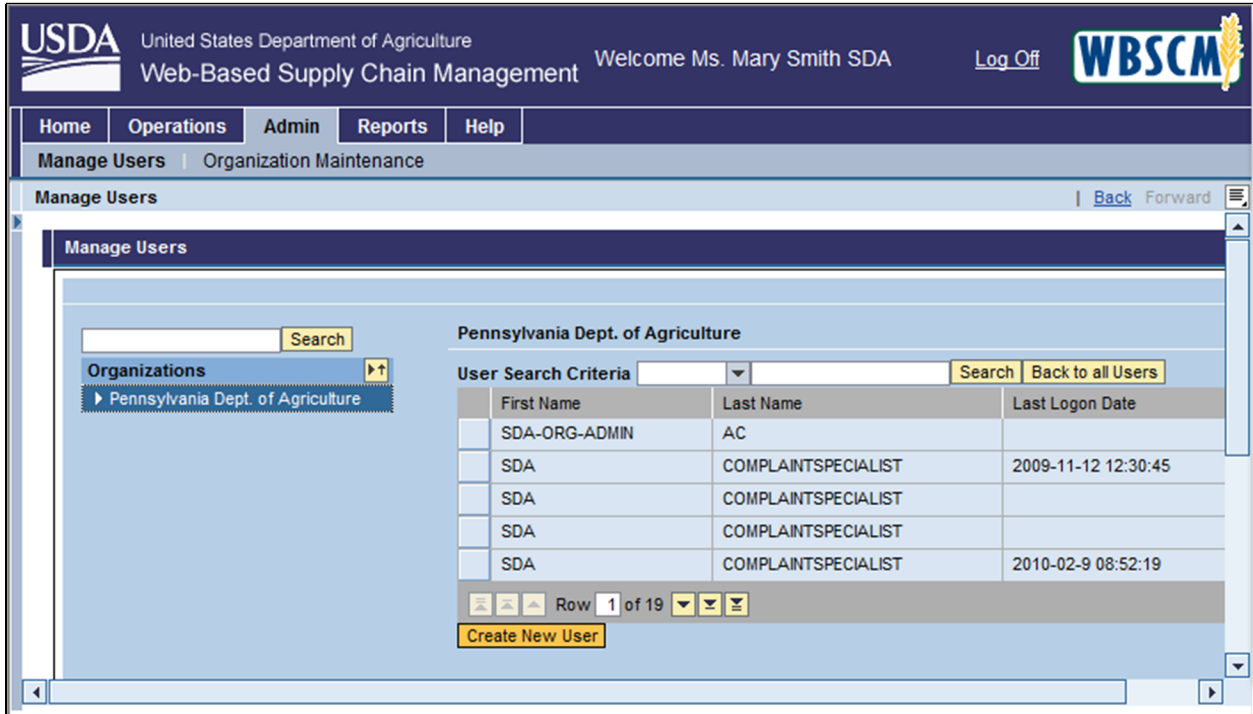
First Name	Last Name	Last Logon Date
SDA-ORG-ADMIN	AC	
SDA	COMPLAINTSPECIALIST	2009-11-12 12:30:45
SDA	COMPLAINTSPECIALIST	
SDA	COMPLAINTSPECIALIST	
SDA	COMPLAINTSPECIALIST	2010-02-9 08:52:19

- In the *Organizations* pane, you will notice there is a list of the organizations for which you can create users. This list will vary based on your User ID. In this case, we are logged in as an SDA User Admin, so we only have access to display and create users within our own SDA, the Pennsylvania Department of Agriculture. In this example, we selected **► Pennsylvania Dept. of Agriculture** (the **Pennsylvania Dept. of Agriculture** option) from the *Organizations* pane.



(Note) If creating an internal user, you will need to select the Agency tree root link prior to selecting the Organization from the *Organizations* pane.

## Manage Users Screen



The screenshot shows the 'Manage Users' screen for the Pennsylvania Dept. of Agriculture. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', and 'Welcome Ms. Mary Smith SDA'. There is a 'Log Off' link and the WBSCM logo. The navigation menu includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The main content area is titled 'Manage Users' and shows a list of users for the 'Pennsylvania Dept. of Agriculture' organization. The list has columns for 'First Name', 'Last Name', and 'Last Logon Date'. The first row is 'SDA-ORG-ADMIN' with last name 'AC'. The next three rows are 'SDA' with last name 'COMPLAINTSPECIALIST'. The last row is 'SDA' with last name 'COMPLAINTSPECIALIST' and last logon date '2010-02-9 08:52:19'. There is a 'Create New User' button at the bottom of the list. The page also shows a search bar and a 'Back to all Users' link.

- A list of users within the organization displays. By selecting the user from the list, you can display or modify details on the user. However, in this case, we wish to create a new user. Click **Create New User** (the **Create New User** button) to create a new user.



(Note) Enter user detail information in the Personal, Role, and Admin data tabs before clicking the Save button at the bottom of the page.



Manage Users Screen

The screenshot shows the 'Manage Users' screen in the WBSM system. The page title is 'Manage Users' and it includes a 'Create New User' button. The form is divided into three tabs: 'Personal data', 'Role data', and 'Admin data'. The 'Personal data' tab is active, showing fields for UserID, First Name, Last Name, Email, Title, Country, State/Province, and Time Zone. The 'Role data' tab shows fields for City, Company, Fax, Mobile Phone, and Phone. The 'Admin data' tab shows fields for Street Address 1, Street Address 2, and Zip Code. A 'Tree Root' button is located at the bottom left of the form area.

- As required, complete/review the following fields:

Field	R/O/C	Description
First Name:	R	<b>Example:</b> Rhonda
Last Name:	R	<b>Example:</b> Davis
Email:	R	<b>Example:</b> rhonda.davis@gmail.com



### Manage Users Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management Welcome Ms. Mary Smith SDA Log Off WBCSM

Home Operations Admin Reports Help

Manage Users | Organization Maintenance

Manage Users | Back Forward

Create New User

User Details

Personal data Role data Admin data

UserID:

First Name: \*

Last Name: \*

Email: \*

Title:

Country: \*

State/Province: \*

Time Zone:

City:

Company:

Fax:

Mobile Phone:

Phone:

Street Address 1:

Street Address 2:

Zip Code:

Tree Root

Save Cancel

6. In the **Country** field, click on the **Dropdown** button.

### Manage Users Screen

USDA United States Department of Agriculture  
Web-Based Supply Chain Management Welcome Ms. Mary Smith SDA Log Off WBCSM

Home Operations Admin Reports Help

Manage Users | Organization Maintenance

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Create New User

User Details

Personal data Role data Admin data

UserID:

First Name: \*

Last Name: \*

Email: \*

Title:

Country: \*

State/Province: \*

Time Zone:

City:

Company:

Fax:

Mobile Phone:

Phone:

Street Address 1:

Street Address 2:

Zip Code:

Tree Root

Save Cancel



- From the Dropdown list, select the **USA** option.

### Manage Users Screen

The screenshot displays the 'Manage Users' interface. At the top, there is a navigation bar with 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below this is a sub-navigation bar with 'Manage Users' and 'Organization Maintenance'. The main content area is titled 'Manage Users' and contains a 'Create New User' button. The 'User Details' section is active, showing three tabs: 'Personal data', 'Role data', and 'Admin data'. The 'Personal data' tab is selected, revealing a form with the following fields: UserID (empty), First Name (Rhonda), Last Name (Davis), Email (rhonda.davis@gmail.com), Title (dropdown), Country (USA), State/Province (dropdown), Time Zone (dropdown), City (empty), Company (0004000269), Fax (empty), Mobile Phone (empty), Phone (empty), Street Address 1 (empty), Street Address 2 (empty), and Zip Code (empty). There are 'Save' and 'Cancel' buttons at the bottom of the form. A 'Tree Root' button is also visible in the bottom left corner of the form area.

- In the **State/Province** field, click on the **Dropdown** button.



### Manage Users Screen

The screenshot shows the 'Manage Users' screen in the WBCSCM system. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', and a welcome message for Ms. Mary Smith SDA. There is a 'Log Off' link and another WBCSCM logo. A navigation menu contains 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below the menu, the breadcrumb trail is 'Manage Users | Organization Maintenance'. The main content area is titled 'Manage Users' and contains a 'Create New User' button. Underneath is the 'User Details' section with three tabs: 'Personal data', 'Role data', and 'Admin data'. The 'Personal data' tab is active, showing a form with the following fields: UserID (empty), First Name (Rhonda), Last Name (Davis), Email (rhonda.davis@gmail.com), Title (dropdown), Country (USA), State/Province (dropdown), Time Zone (dropdown), City (empty), Company (0004000269), Fax (empty), Mobile Phone (empty), Phone (empty), Street Address 1 (empty), Street Address 2 (empty), and Zip Code (empty). There are 'Save' and 'Cancel' buttons at the bottom of the form. A 'Tree Root' button is also visible in the bottom left corner of the form area.

- From the Dropdown list, select the **Michigan** option.

### Manage Users Screen

This screenshot is identical to the one above, but the 'State/Province' dropdown menu is now set to 'Michigan'.



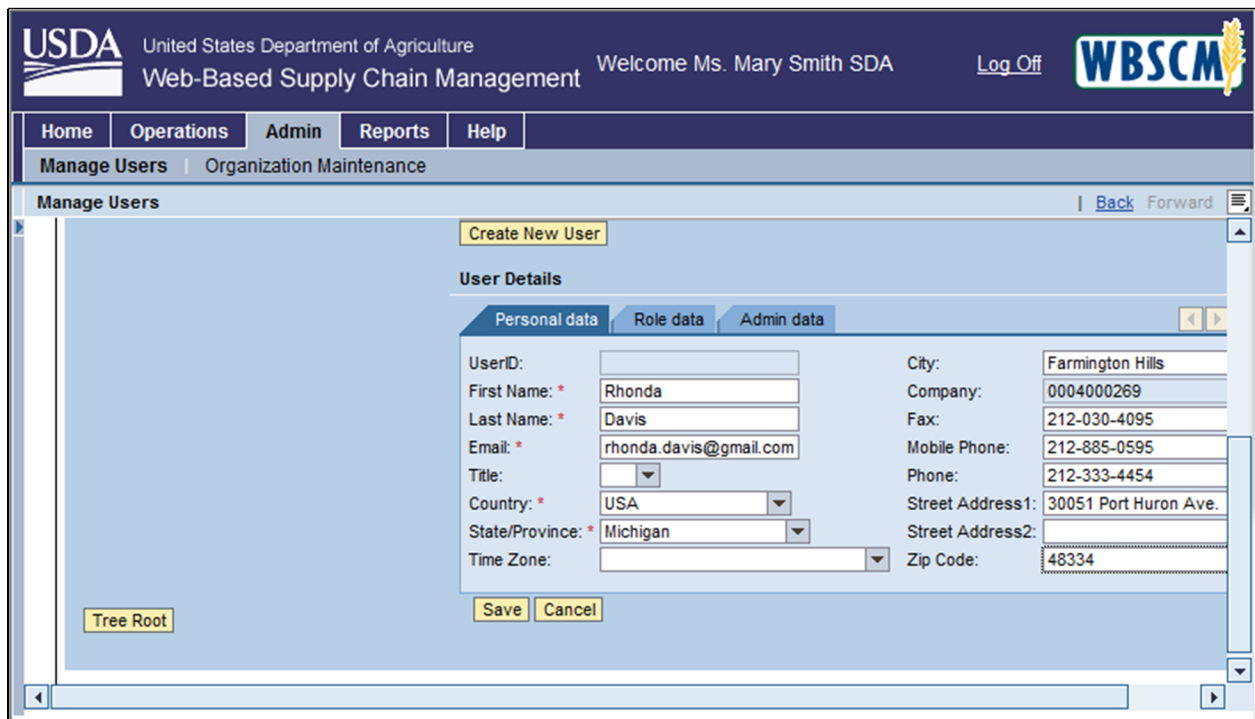


## Create User

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

Field	R/O/C	Description
City:	<input type="radio"/>	<b>Example:</b> Farmington Hills
Fax:	<input type="radio"/>	<b>Example:</b> 212-030-4095
Mobile Phone:	<input type="radio"/>	<b>Example:</b> 212-885-0595
Phone:	<input type="radio"/>	<b>Example:</b> 212-333-4454
Street Address1:	<input type="radio"/>	<b>Example:</b> 30051 Port Huron Ave.
Zip Code:	<input type="radio"/>	<b>Example:</b> 48334

**Manage Users Screen**

The screenshot displays the 'Manage Users' interface. At the top, it shows the USDA logo and 'United States Department of Agriculture Web-Based Supply Chain Management'. The user is logged in as 'Ms. Mary Smith SDA'. The main navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The current page is 'Manage Users' under 'Organization Maintenance'. A 'Create New User' button is visible. The 'User Details' section has three tabs: 'Personal data', 'Role data', and 'Admin data'. The 'Personal data' tab is selected, showing a form with the following fields and values:

UserID:		City:	Farmington Hills
First Name: *	Rhonda	Company:	0004000269
Last Name: *	Davis	Fax:	212-030-4095
Email: *	rhonda.davis@gmail.com	Mobile Phone:	212-885-0595
Title:		Phone:	212-333-4454
Country: *	USA	Street Address 1:	30051 Port Huron Ave.
State/Province: *	Michigan	Street Address 2:	
Time Zone:		Zip Code:	48334

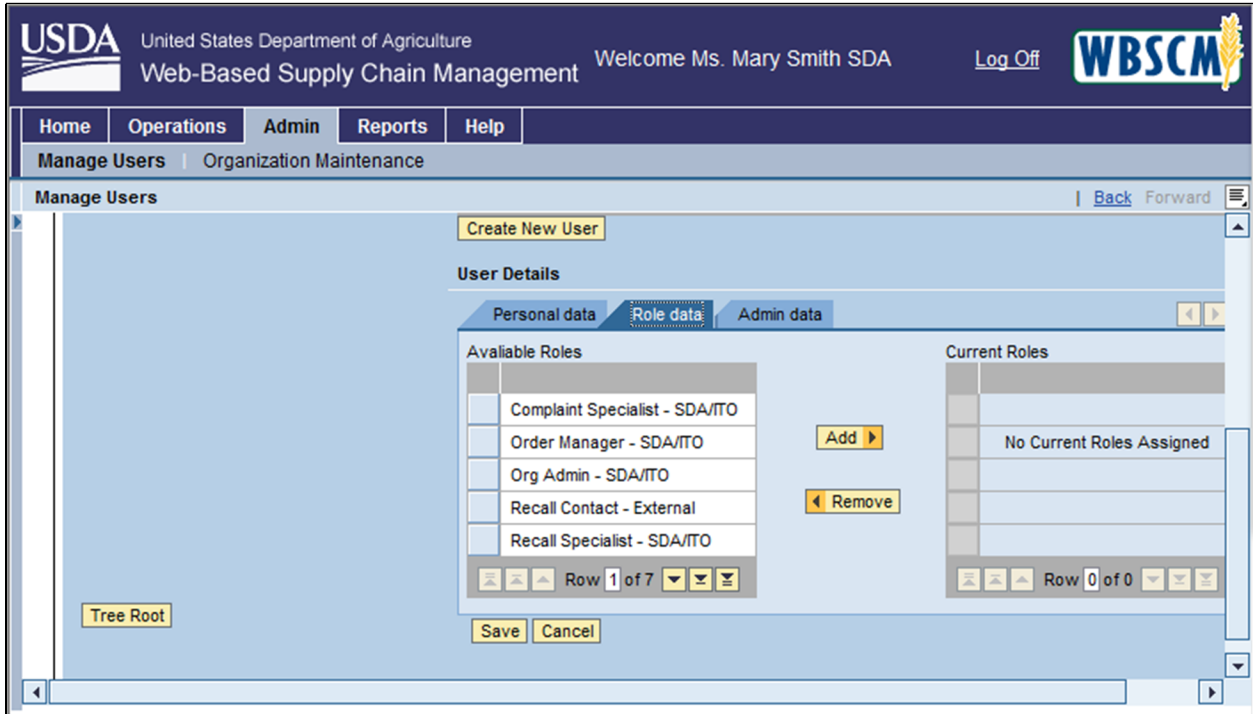
At the bottom of the form are 'Save' and 'Cancel' buttons. A 'Tree Root' button is also visible in the bottom left corner of the form area.

11. After you have entered all information on the **Personal Data** tab, click **Role data** (the **Role Data** tab) to begin assigning security roles to the new user.



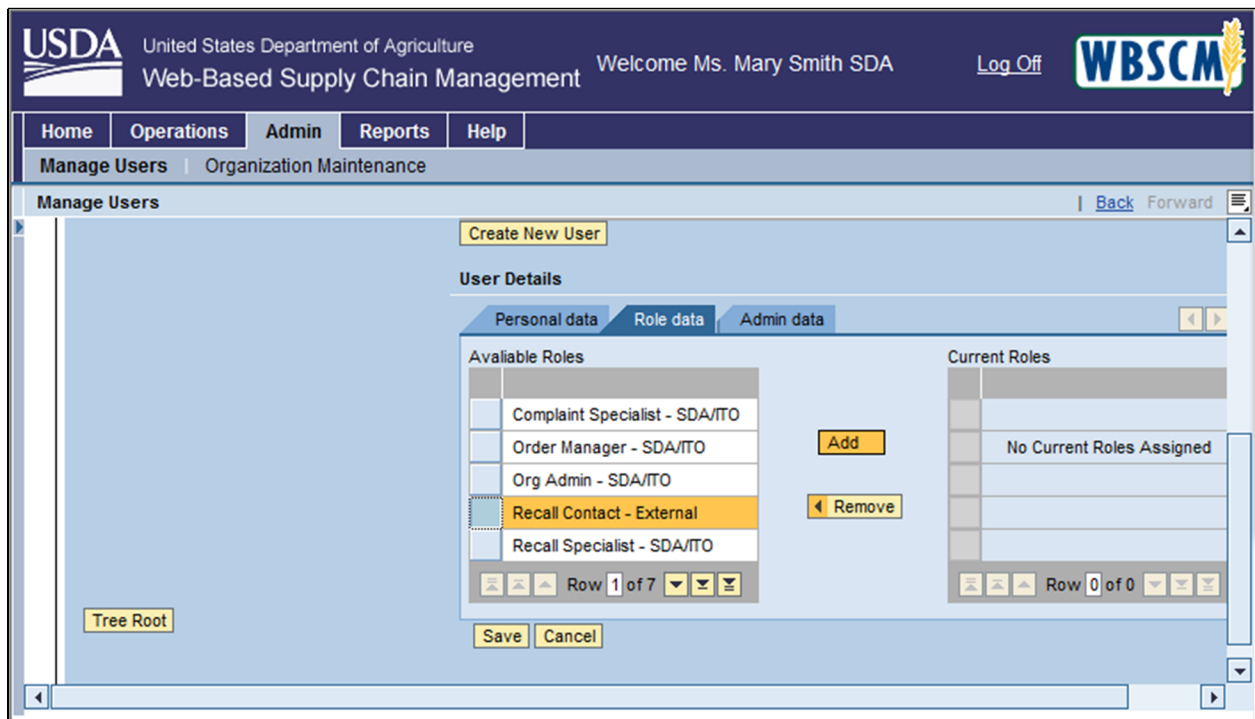
(Note) Note that you may toggle between the tabs without needing to save your changes. All changes can be saved at the end by clicking the **Save** button.

## Manage Users Screen

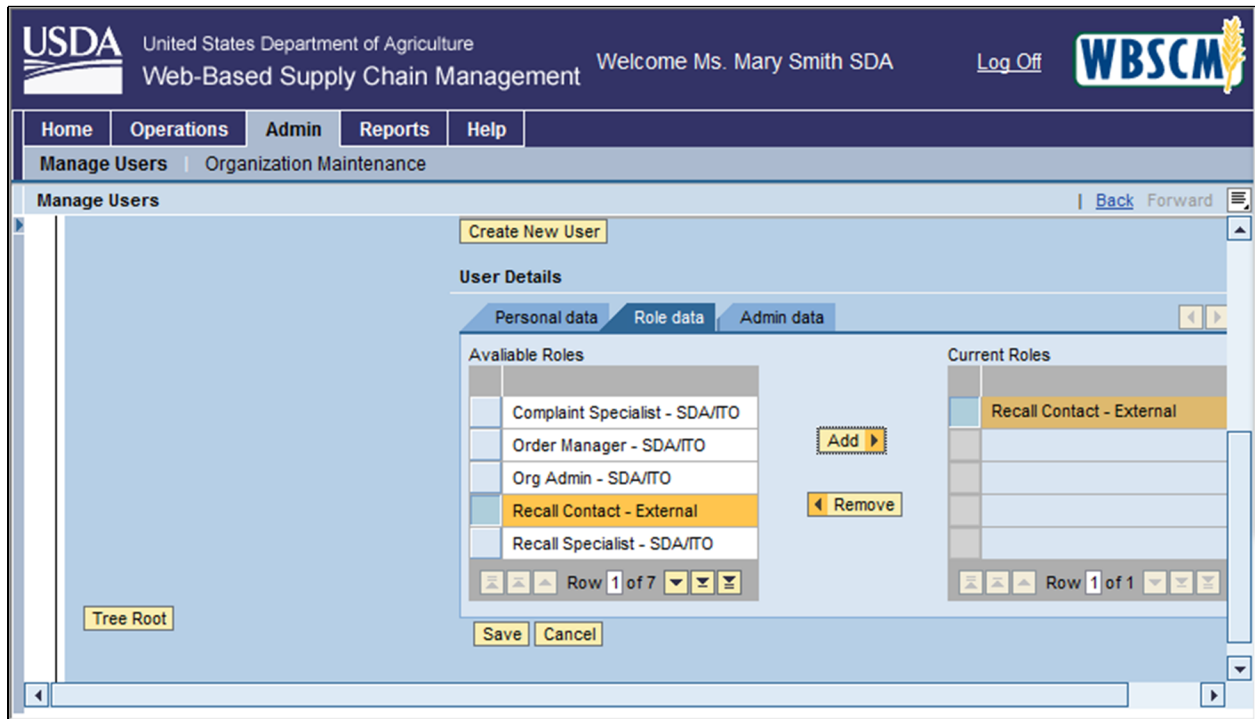


The screenshot displays the 'Manage Users' interface. At the top, the USDA logo and 'United States Department of Agriculture' are visible, along with the text 'Web-Based Supply Chain Management' and 'Welcome Ms. Mary Smith SDA'. A 'Log Off' link is present. The navigation menu includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The main content area is titled 'Manage Users' and contains a 'Create New User' button. Below this is the 'User Details' section, which has three tabs: 'Personal data', 'Role data', and 'Admin data'. The 'Role data' tab is active, showing two columns: 'Available Roles' and 'Current Roles'. The 'Available Roles' column lists five roles: 'Complaint Specialist - SDA/ITO', 'Order Manager - SDA/ITO', 'Org Admin - SDA/ITO', 'Recall Contact - External', and 'Recall Specialist - SDA/ITO'. The 'Current Roles' column is empty, showing 'No Current Roles Assigned'. There are 'Add' and 'Remove' buttons between the columns. At the bottom, there are 'Save' and 'Cancel' buttons. The top navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'.

12. Notice there are two columns on this screen. The *Available Roles* column refers to all possible security roles that can be assigned to the new user. The *Current Roles* column refers to all roles that are currently assigned to the user. Pick a role from the *Available Roles* column. Select  (the **blue box**) next to the role you wish to assign. In this case, we selected  (the **Blue box**) next to *Recall Contact - External*.

**Manage Users Screen**

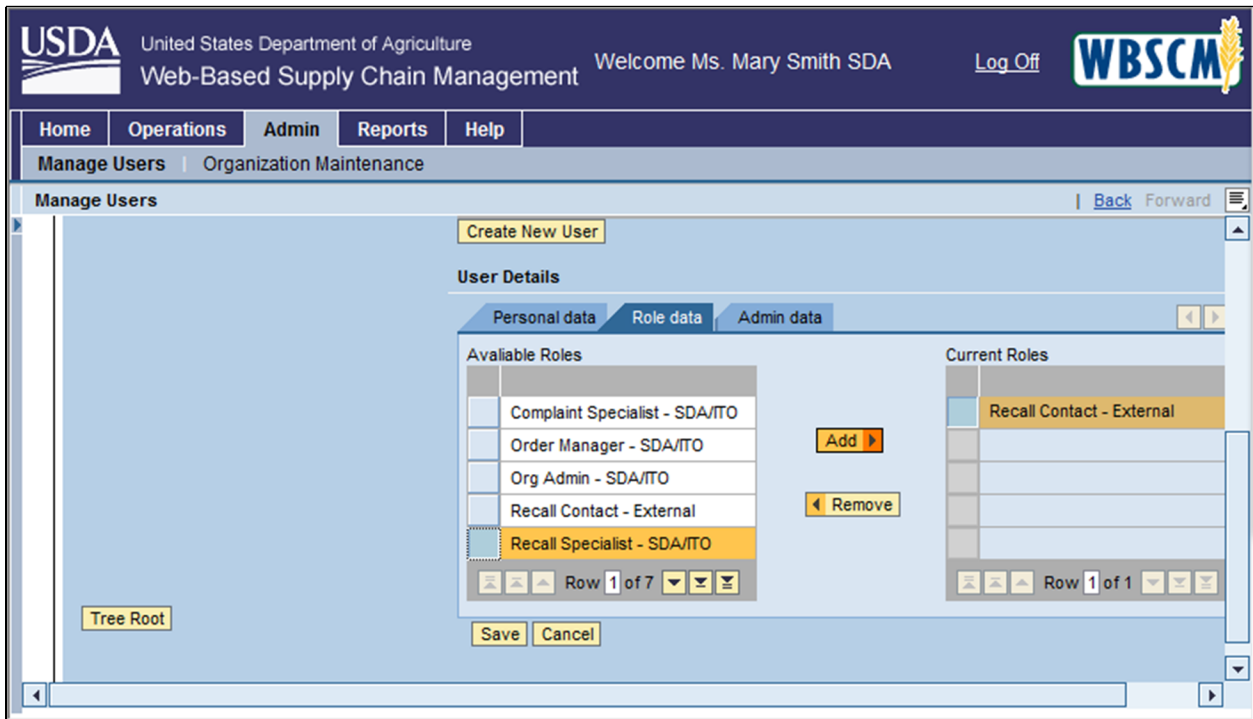
13. The role is now highlighted in orange. Click **Add** (the **Add** button) to add the highlighted role to the Current Roles column.

**Manage Users Screen**

14. Some users will have multiple security roles assigned to them. Follow the same process for assigning a second role to the user. In this case, we selected  (the **blue** box) next to *Recall Specialist - SDA/ITO* to assign this role.

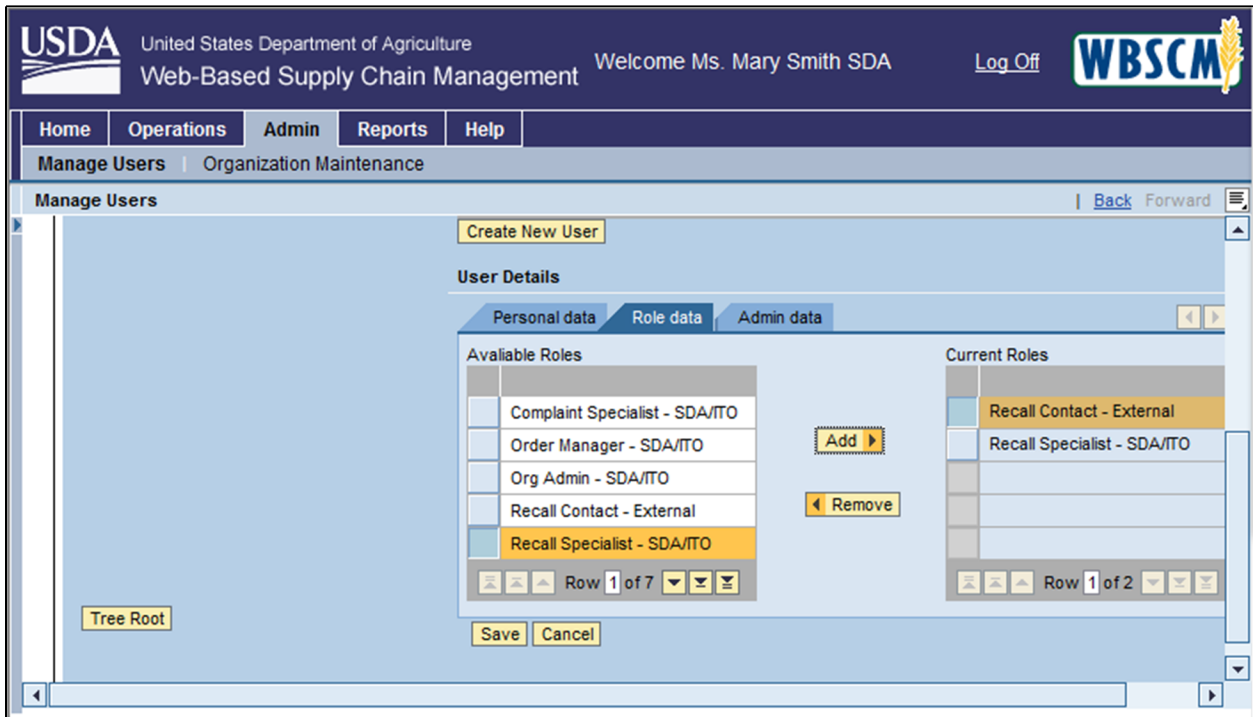


### Manage Users Screen



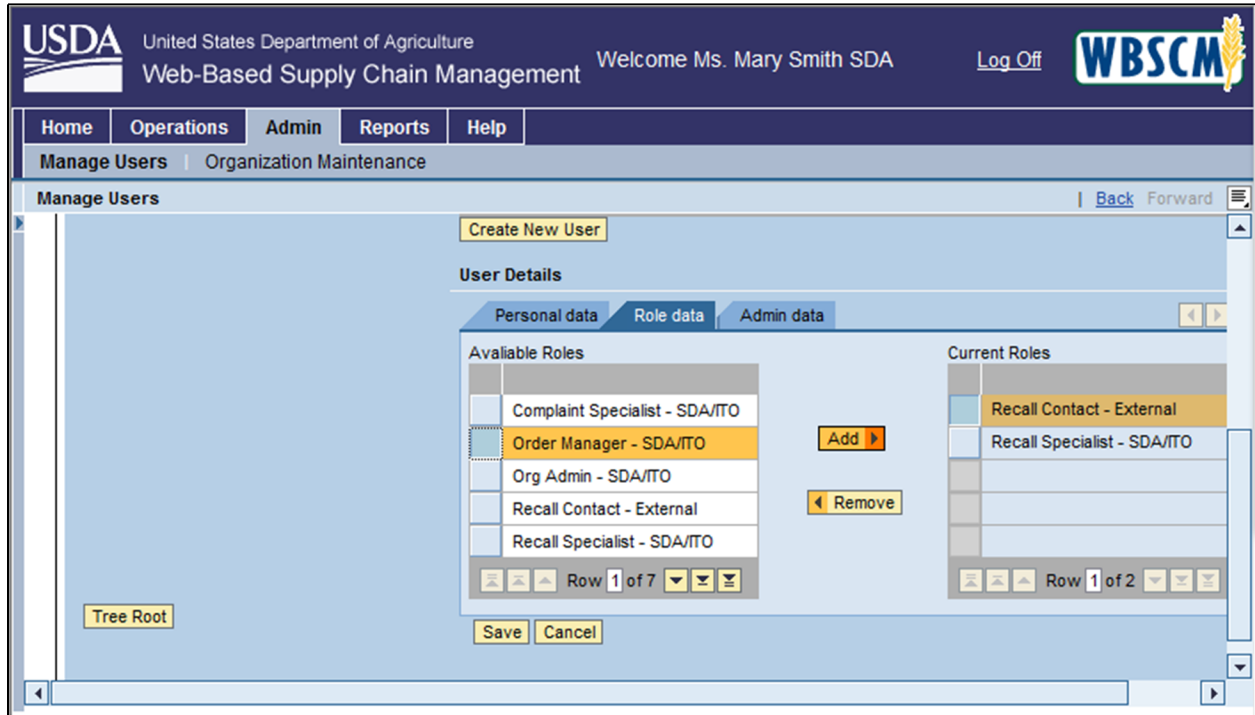
15. Click **Add** (the **Add** button) to add the role to the *Current Roles* column.

### Manage Users Screen



16. Select  (the **Blue** box) next to the *Order Manager - SDA/ITO* role to assign this role to the new user.

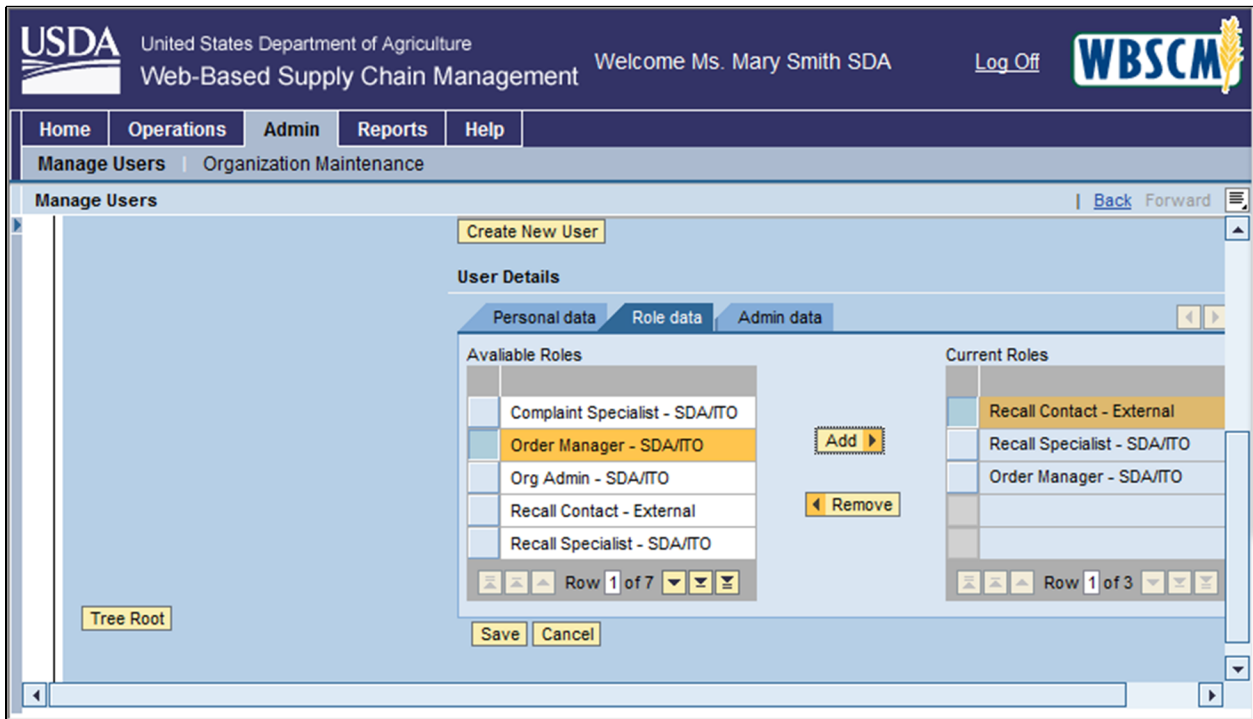
### Manage Users Screen



The screenshot shows the 'Manage Users' screen in the USDA Web-Based Supply Chain Management system. The user is Ms. Mary Smith SDA. The screen displays the 'User Details' form, specifically the 'Role data' tab. The 'Available Roles' list includes 'Complaint Specialist - SDA/ITO', 'Order Manager - SDA/ITO' (highlighted with a blue box), 'Org Admin - SDA/ITO', 'Recall Contact - External', and 'Recall Specialist - SDA/ITO'. The 'Current Roles' list includes 'Recall Contact - External' and 'Recall Specialist - SDA/ITO'. An 'Add' button is located between the two lists, and a 'Remove' button is below it. The 'Add' button is highlighted with a red box. The screen also includes a 'Create New User' button, a 'Tree Root' button, and 'Save' and 'Cancel' buttons at the bottom.

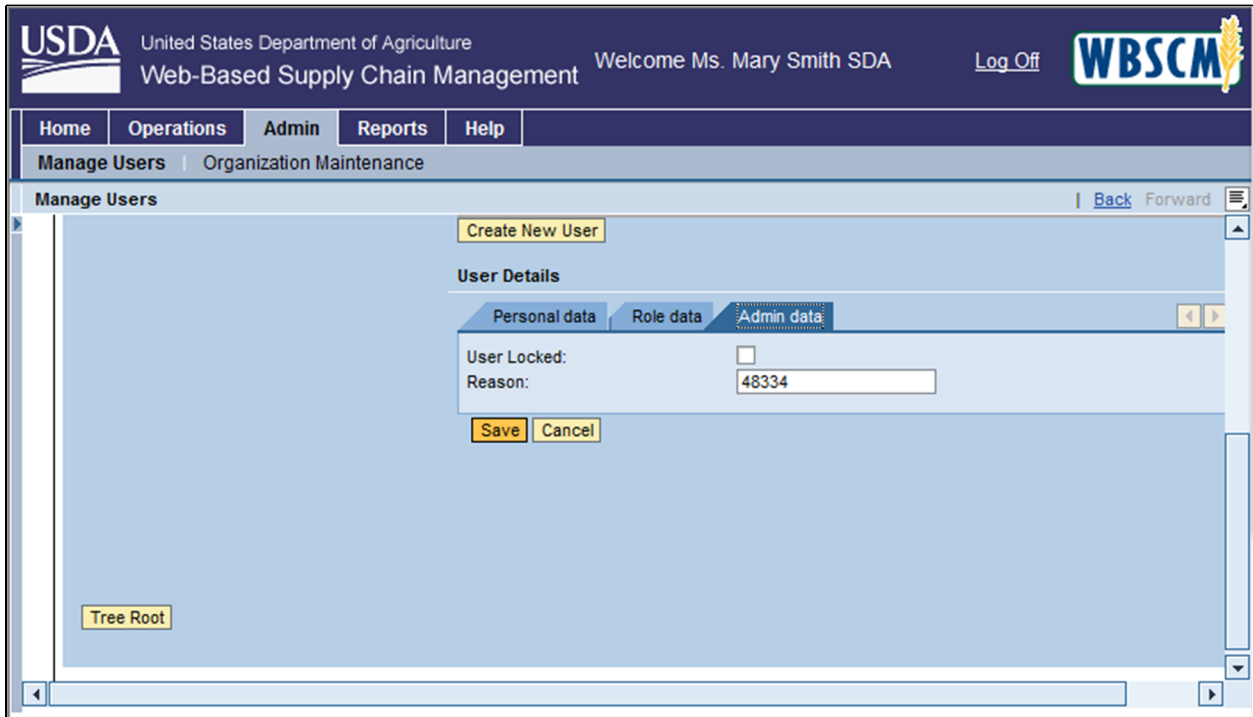
17. Click  (the **Add** button) to add this role to the *Current Roles* column.

### Manage Users Screen



18. After you have added and removed all roles, as needed, click **Admin data** (the **Admin Data** tab).

### Manage Users Screen



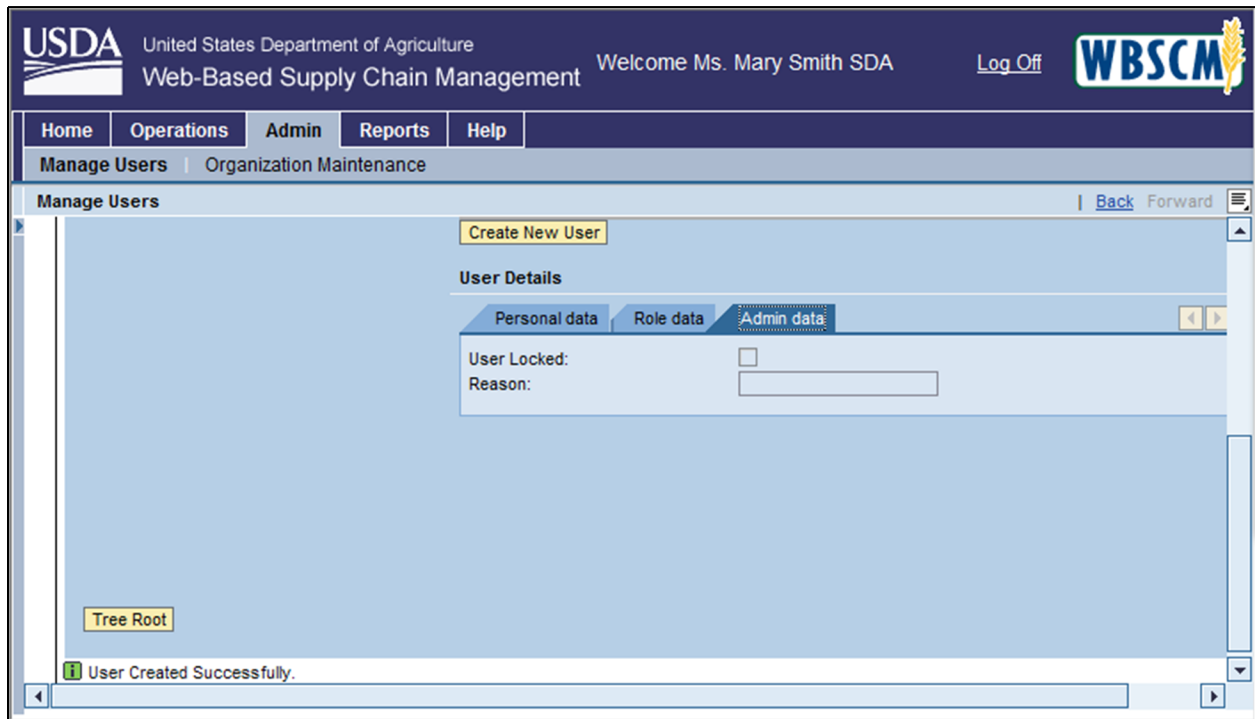


19. Click **Save** (the **Save** button) to save your user.



(Note) At this time, you do not need to add any information on the Admin data tab. However, if you ever wish to lock a user's account (such as when a user leaves the company), you would do so on this tab.

### Manage Users Screen



USDA United States Department of Agriculture  
Web-Based Supply Chain Management Welcome Ms. Mary Smith SDA [Log Off](#) WBSCM

Home Operations **Admin** Reports Help

Manage Users | Organization Maintenance

Manage Users | [Back](#) [Forward](#)

**Create New User**

User Details

Personal data Role data **Admin data**

User Locked:   
Reason:

Tree Root

**User Created Successfully.**

20. You have completed this transaction.



(Note) Notice the information message on the bottom of the screen indicating that the user was created successfully.