This Recipient Agency (RA) Training Guide has been developed to assist our recipients (schools and other organizations) in utilizing USDA’s online ordering program – known as Web-Based Supply Chain Management, or WBSCM.

Rhode Island USDA Food Distribution Program
Index

Important Contacts…Page 3
When the State Sets Up Your WBSCM Account…Page 4
Correct Internet Explorer Settings…Page 19
The WBSCM Home Page…Page 21
Navigating WBSCM…Page 22
Create Portal Favorites…Page 23
Updating Your Profile…Page 26
What To Do If You Can’t See All The Tabs…Page 27
Setup WBSCM Accounts For Your Staff…Page 31
Finding Your Entitlement…Page 40
Using the Catalog Worksheet…Page 45
Entering an Order into WBSCM…Page 47
Running a Requisition Status Report…Page 62
Running A Value of Commodities Received – RA Report…Page 70
Rhode Island Contacts:
  Dennis J. Sullivan
  Phone: 401-462-5111
  Email: dennis.j.sullivan@doc.ri.gov
Contact Dennis for all questions about USDA Foods and the USDA Foods Program in Rhode Island.

WBSCM Help Desk:
  Help Desk Hours: 8:00 AM to 6:00 PM Eastern Time
  Phone: 877-WBSCM-4U or 877-927-2648
  Email: WBSCMhelp@ams.usda.gov
Contact the WBSCM Help Desk for any trouble you have once you log into the WBSCM system.

eAuth Help Desk:
  Help Desk Hours: 8:00 AM to 8:00 PM Eastern Time
  Phone: 800-457-3642
  Email: eAuthHelpDesk@ftc.usda.gov
Contact the eAuth Help Desk only after contacting the WBSCM help desk. They can only help with trouble logging into your WBSCM account, or re-setting your username and password. The WBSCM help desk is usually able to resolve these issues as well, so try them first.
WHEN THE STATE SETS UP YOUR WBSCM ACCOUNT
-----Original Message-----
From: WBSCM_USER_REGISTRATION@AMS.USDA.GOV [mailto:WBSCM_USER_REGISTRATION@AMS.USDA.GOV]
Sent: Wednesday, March 16, 2011 1:31 PM
To: Golia, Dom
Subject: Action Required: Register USDA WBSCM User Account

This email is for the individual identified in the greeting line and cannot be shared with any other user.

Dear Dom Golia,

A user account has been created for you on the United States Department of Agriculture (USDA) Web-Based Supply Chain Management (WBSCM) System. In order to access this account, you will need to obtain a username and password from the USDA eAuthentication System.

Important:
The email address appearing in the To: line of this message, and the last name of the recipient in the greeting line must be entered in eAuthentication registration forms. Failure to follow this procedure will result in an error message during WBSCM registration.

1. If you do not already have an eAuthentication account, please access http://www.eauth.egov.usda.gov/eauthCreateAccount.html to request a Level 1 account.

2. Once your eAuthentication account has been activated, please access the following address to complete your WBSCM registration:

https://portal.wbscm.usda.gov/registration?action=init&token=3e%B5riep8iduvQHypYof%2FKy1NiFBzopGNCZH%2BWBEWJzWVAKqbn2mmO2kH7nW2AFF%2F

3. Once you have completed your WBSCM registration, please use the following URL for ALL future WBSCM logins: http://www.usda.gov/wbscm

If you have any questions, please contact your user administrator.
dennis.j.sullivan@doc.rigov

This is an automatically generated message. Please do not reply back to this email.
---- Original Message ----
From: WBSCM_USER_REGISTRATION@AMS.USDA.GOV [mailto;WBSCM_USER_REGISTRATION@AMS.USDA.GOV]
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   https://portal.wbscm.usda.gov/registration?action=init&token=3e%28Sriep8iduvQHpYof%2Fky1WiFBzopGNCZH%2BwBEWJzNVAK1qnn2mr0XeH7nI2AFF%2F

3. Once you have completed your WBSCM registration, please use the following URL for ALL future WBSCM logins: http://www.usda.gov/wbscm

If you have any questions, please contact your user administrator.

dennisj.sullivan@doc.ri.gov

This is an automatically generated message. Please do not reply back to this email.
Click on “Level 1 Access”
Create your Password

Required Requirements:

• 12 - 24 characters long
• At least one uppercase
• At least one lowercase
• At least one number (1 – 9)
• At least one special character
• Passwords cannot be dictionary words
Create Your eAuth Account

Email Must Match WBSCM Email

Last Name Must Match WBSCM Email
Click “Submit” Button

Create an eAuthentication Account

Step 2 of 4 - Level 1 Access Account Verification

If this information is incorrect, please click the edit if the information is correct, please continue by clicking the submit button.

Verify User Information

User ID: linda.huben
Name: Linda Hubeny
Email: Linda.Huben@ct.gov

Verify Security Questions & Answers

Q: What is the name of your first pet
   A: Fred

Q: What was your high school mascot
   A: Bull

Q: Who was your prom date
   A: Brad Pitt

Q: What is the name of your first school
   A: Davis
Check Your Email

No need to print. Just make sure the message says “Congratulations” at the bottom.
Step 4 of 4 - Instructions to Activate Your USDA Account with Level 1 Access

Congratulations hartford.linda, you have successfully created a USDA eAuthentication account with Level 1 access.

Before you can use your account with Level 1 access you must do the following:

1. Please wait approximately 10 minutes from the receipt of this email before you activate your account with Level 1 access.
2. Click ACTIVATE MY ACCOUNT

   NOTE. If you have trouble accessing your activation link above, please copy and paste the following URL into your browser address bar:
   

The User ID you created is: hartford.linda
The email address you provided is: linda_hubeny@ct.gov

Please retain this information for future reference.

Once you have activated your account you will have immediate access to the USDA portals and applications that accept accounts with Level 1 access.

You can also view or update your account information by clicking on the eAuthentication USER ACCOUNT HOME link.

   NOTE. If you have trouble accessing your user account home link above, please copy and paste the following URL into your browser address bar:


If you need further assistance, please contact the ITS Service Desk at eAuthHelpDesk@ftc.usda.gov or call 800-457-3642.

Please include the following information in your request:

- Your first and last name
- Your eAuthentication User ID
- The URL (web address) of the website or application you were attempting to access
- The text of any error messages and a detailed description of the problem

Thank You,
-- The USDA eAuthentication Team
Your eAuth Account Has Been Activated!

Create an eAuthentication Account

Step 4 of 4 - Account Activated

Your account has been activated with Level 1 Access. Please wait 20 minutes from the time of activation before using the account.

eAuthentication Account Information:

User ID: hartford.linda
Email: linda.hubeny@ct.gov

Non-USDA Federal Employees Requesting Level 2 Access

If you are not a USDA Federal Employee and have requested Level 2 Access, you must visit a USDA service center for identity-proofing by a Local Registration Authority (LRA). Find an LRA.

If you cannot find an LRA, contact the ITS Service Desk:
email: eAuthHelpDesk@ftc.usda.gov
Phone: 800-457-3642
STEP 2 – Go Back To The First Email

-----Original Message-----
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1. If you do not already have an eAuthentication account, please access http://www.eauth.egov.usda.gov/eauthCreateAccount.html to request a Level 1 account.

2. Once your eAuthentication account has been activated, please access the following address to complete your WBSCM registration:

https://portal.wbscm.usda.gov/registration?action=init&token=3e%2BSriepBiduvQHpYof%2Fky1NiFBzopGNCZH%2BWBEwJzNvAKiqn2mrOxeH7nW2AFF%2F

3. Once you have completed your WBSCM registration, please use the following URL for ALL future WBSCM logins: http://www.usda.gov/wbscm

If you have any questions, please contact your user administrator.

dennis.sullivan@doc.go.gov

This is an automatically generated message. Please do not reply back to this email.
Click – “I Agree”

***************WARNING***************

- You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

- By using this information system, you understand and consent to the following:
  - You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
  - Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
  - Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA’s Chief Information Officer.

***************WARNING***************
Enter the eAuth User ID and Password You Just Created
WBSCM Rules of Behavior

Rules of Behavior

(Version 1.0)

Web Based Supply Chain Management (WBSCM) participants must understand and agree to their information security responsibilities to be allowed access to the WBSCM system. WBSCM rules of behavior for all participants include, but are not limited to, the following:

1. Participants shall understand and comply with United States Department of Agriculture (USDA) policies and procedures, and with federal, state, and local laws.

2. Users shall protect their UserIDs and passwords from disclosure.
Congratulations! You’ve Made it into WBSCM!

Can’t see all of these tabs? Follow the instructions on Page 27 to fix this.
MS Internet Explorer 8 or Higher Compatibility & Disable Pop-Up Blocker

First, you want to make sure your settings are correct – follow the steps on these two pages to change them.

Turn Internet Explorer 8 Compatibility View on and disable your Pop-Up Blocker
Get rid of that darn bar that doesn’t let you print!

To stop the information bar from blocking file and software downloads

1. Open Internet Explorer by clicking the Start button. In the search box, type Internet Explorer, and then, in the list of results, click Internet Explorer.

2. Click the Tools button, and then click Internet Options.

3. Click the Security tab, and then click Custom level.

4. Do one or both of the following:
   • To turn off the Information bar for ActiveX controls, scroll to the ActiveX controls and plug-ins section of the list, and then, under Automatic prompting for ActiveX controls, click Enable.
   • To turn off the Information bar for file downloads, scroll to the Downloads section of the list, and then, under Automatic prompting for file downloads, click Enable.

5. Click OK, click Yes to confirm that you want to make the change, and then click OK again.
The WBSCM Home Page

Welcome Jane Doe

Your name will appear here

Click here when you’re done to Log Off

News and Announcements

If Dot is Orange
There’s New Info

News and Announcements from USDA

New content since your last visit
Navigating WBSCM

There are 4 tabs at the top of the WBSCM page – Home, Operations, Admin, Reports, and Help. When you click on one of these tabs, different options will appear in the “Detailed Navigation” column on the left hand side of the page. When you click on the options under the Detailed Navigation column, you will get to different areas, such as “Manage Users” or “Domestic Order Entry”.

To get to these areas more quickly, you can create a “Portal Favorite” – then the link to that area will always show up in the Detailed Navigation Column, no matter where you are in WBSCM.
CLICK “Expand” Button
Portal Favorite Creation Completed

"Manage Users" Portal Favorite
Important – Complete this section to receive Hold/Recall Announcements, then click “Update”

This Message will Appear After You Click “Update”

If you don’t want to receive WBSCM update emails, check this box and click “update”
What to do if you can’t see all the tabs at the top of the page:

If you only see Home, Admin and Help at the top of the page, you’ll need to change your “Current Roles.” To do this, go to “Manage Users” and follow these steps.

Click on the box next to the person’s name and their information will appear below.

Note: if you change your email and last name on this page, it must match the email and last name on your eAuth account or you will be locked out – if you want to do this, call the WBSCM help desk to walk you through the steps.
If Order Manager Isn’t in “Current Roles” – Add it

“User Updated Successfully” will appear after “Save” button is clicked. All the tabs should now be visible at the top of the page.
NEVER LOCK USER
SETUP WBSCM ACCOUNTS FOR YOUR STAFF

You only need to follow these steps if you need to set up accounts for other staff at your school or organization. Otherwise, skip ahead to page 40.
Manage Users Will Display the People that are Assigned to Your District in WBSCM

If You Created a Portal Favorite – It’s Just One Click!
Creating a New User
Creating a New User – Personal Data Tab
Creating a New User – Personal Data Tab

Email & Last Name Must Match eAuth Account
Creating a New User – Role Data Tab

Make Sure to Add Order Manager & Org Admin
When you click “Save” the New User email will automatically be sent to the new user.
User Created Successfully

This Message Will Appear

User Created Successfully.
NEW USER WILL RECEIVE EMAIL

THE NEW USER WILL START AT PAGE 5
Finding Entitlement
Running an Entitlement Summary Report

1. Log in to WBSCM
2. Click on the “Reports” tab at the top of the page
3. Click “Entitlement Management” in the left hand column
4. Click “Entitlement/Bonus Summary Report”
3. Fill in “nslp” for the Program
4. Fill in “2017” for the Program Year (for School Year 2016-2017)
5. Click “Print PDF output”
6. Click “Open”
Entitlement/Bonus Summary Report Details

This is the dollar amount of USDA Foods that your school/organization is entitled to for this year.

This is the entitlement dollar amount that you’ve spent on USDA Foods already.

This is the amount of entitlement remaining that you can still spend.

The first page of the report is nonsense – scroll to page 2, and this is what you’ll see.
The USDA Foods Catalog Worksheet is NOT found in WBSCM. It is a spreadsheet, available in Excel and as a PDF, that the Rhode Island FDP creates each year to help schools plan their order. This spreadsheet will be emailed out to food service managers when the catalog opens each year in January or February, and it will also be available on the program website (http://html).
**USDA Foods Catalog Worksheet**

The available products are listed here – clicking on the links will open up the product factsheet in your web browser.

The blue boxes show the dates that the product will be delivered to the warehouse – fill in the number of cases you’d like in these boxes. You’ll have 4 months from this date to get all of your cases from the warehouse to your school.

If you use the excel version of the sheet, the total number of cases of the product will self-total here...

...and the cost of your order of that product will self-total here. Scroll down further, and a green grand total box at the bottom will keep track of the cost of your full order.
Entering an Order for Delivery to the Warehouse In WBSCM

Once you have planned your order by finding your entitlement and filling out your catalog worksheet, you’re ready to log back into WBSCM and place that order.

Tip: WBSCM will log you out after a few minutes of inactivity. If you are logged out while you are placing an order (you stop to answer the phone, get a drink of water, etc.), you will lose everything you’ve put in your cart.

Therefore, we suggest breaking your order up into multiple small orders. For example, working off your catalog worksheet, put all your frozen vegetables in your cart, and then go through the steps to page 61 (when you see the order confirmation page). Then go back to page 48 and put all your canned vegetables in your cart, etc. There is no limit on the number of separate orders you place – just as long as it all adds up to your entitlement amount (plus 5%) in the end.
1. Click the “Operations” tab at the top of the page
2. Under the Detailed Navigation box on the left hand side of the page, click “Order Management”
4. In the lighter blue column, click “NSLP”
5. Under “NSLP”, click “Direct Delivery”
6. Click on the product category you want
7. Under the product category, click “Entitlement”
8. Now, products should appear!
Select “All” to View All Items in the Catalog.
Find the product you want to order, and click on the shopping cart icon next to it.
Enter the quantity you’d like delivered to the warehouse for you for each delivery date (look at your catalog worksheet!)

When you’ve entered the number of cases you want, click “Move the Cart”
When you’re ready to submit your Order

You can continue adding items to your cart (pages 50 and 51). When you’re done adding items, click “View Cart” to continue on and process your order.

Tip: As you add items to your cart, you will see the quantity and value increase here. Each date counts as an “Item.”
To Expand the View

Click hide navigator button (that sidewise triangle) to hide this view and make your items easier to see.

Then, click this triangle to see the expanded details for each of the items in your cart.
Changing Deliver To Location

Under each item, you now see a “Deliver To” box. Click on that box, and select the warehouse you want this item delivered to.

The current USDA Foods storage and Delivery Contractor (Central Distribution Center) now has just one warehouse – this is the only delivery location you will see, but you still need to select it!
Click Update to save the deliver to locations

After you’ve selected the correct warehouse for each item, click “Update” or the Delivery Location won’t “stick”
Or, you can assign one delivery location to all your items at once...

If all or most of your items are going to the same warehouse, you can assign the delivery to locations all at once, by selecting the right location up top, and then putting a check mark next to each item that’s going to that location. When you hit “update” that location will appear under each item you selected.

Tip: Checking this box will check the box next to all of your items.

After Changes Are Made – Click “Update” or the Delivery Location won’t get assigned.
You can change the quantity of cases in your order here. But, you can’t change the quantity to zero…

After any changes are made, click “update” again, or these changes won’t “stick”

...if you want to delete an item, put a check mark in the box under the trash can.
If you want to add more items, click this 

button. **DO NOT** try to add more items by just clicking “Domestic Order Entry” on the left hand side of the page – since you haven’t submitted this cart yet, you would lose everything in it if you did that.

Remember: You can always create another order later, so if you’re happy with these items, it’s best to go ahead and submit this order now, then create a new order to add the rest of your items.
Take a last look. Are your quantities right? Did you select the right delivery locations? Did you hit “Update” after making changes? If so, click “Order” to place this order!
Click “OK” to process your order.
Tip: If you click “Cancel” at this step, you will lose your whole shopping cart.
Confirmation of Receipt

Is everything correct? If not, you must contact the RI FDP as soon as possible (401-462-5111) to have your order declined.

IMPORTANT: If you don’t get to this confirmation page, you haven’t completed your order!!
Running A Requisition Status Report

The Requisition Status Report shows school’s the current status of their order. It can be used to see if ordered items have been submitted to USDA or cancelled, if delivery dates have been changed, or if items have been delivered to the warehouse.
1. Once you’ve logged into WBSCM, click on the “Reports” tab near the top of the page.

2. In the “Detailed Navigation” box, click on “Requisition Status Report”
3. Under “Reports: Input Criteria” fill in the following information:
   - Enter “NSLP” for Program
   - Enter the dates for this school year for “Requested Delivery Date” – for the School Year starting August 2015, enter “07/01/2015” to “06/30/2016”
   - You do not need to fill in any of the other boxes!

4. Click “Print PDF Output” – this will create a PDF document that you can read on your computer. You do not need to be hooked up to a printer to click this button.
5. When the file download box pops up, click “Open”
The PDF of the Requisition Status Report will open up. The first page will look like this – it’s nonsense – scroll through to the second page!
The “Req./ Redis. Status” column shows the current status of your order for that item. “Ready for Approval” means the order has been submitted to the State, but the State has not yet submitted the order to USDA. “Approved by SDA” means the State has submitted the order to USDA. “Cancelled” means that the State or USDA cancelled your order for this item. Throughout the year, you will see other status messages listed here, such as “On Invitation” and “Purchased”, as USDA moves through the procurement process for these items.
Once the Status has changed to “Approved by SDA”, check the “Delivery Period” column and the “Order Qty” column to see if there have been any changes.

- For some items, the state may have moved a delivery period forward or back in order to share a truck with a neighboring state.
- Larger schools may notice that the quantity they ordered was adjusted up or down by a few cases – this allows the State to order a full truckload.
If you’d like, you can print or save this report for future reference.
Running A Value of Commodities Received – RA Report

The Value of Commodities Received Report shows schools the Value of the USDA Foods they have received during a certain time period. Business Managers often ask for this information at the end of the School Year, and this is a report the Food Service Manager can run to provide that information.
1. Once you’ve logged into WBSCM, click on the “Reports” tab near the top of the page.

2. In the “Detailed Navigation” box, click on “Value of Commodities Received - RA”
1. Fill in “NSLP” for Program
2. Fill in the dates you’d like to check under “Req. Delivery Date”
3. Sold-To Party should be filled in with your RA ID number already.
4. Click “Print PDF Output” (You don’t need to be hooked up to a printer to do this!)
1. Click “Open”
1. The first page of the report is nonsense – use the arrow keys or the scroll bar to scroll down to page 2.
1. At the bottom of the report, you will see the total value of the USDA Foods you received during this time period.
2. You can save or print this report for your records.
The U.S. Department of Agriculture (USDA) prohibits discrimination against its customers, employees, and applicants for employment on the bases of race, color, national origin, age, disability, sex, gender identity, religion, reprisal and, where applicable, political beliefs, marital status, familial or parental status, sexual orientation, or if all or part of an individual's income is derived from any public assistance program, or protected genetic information in employment or in any program or activity conducted or funded by the Department. (Not all prohibited bases will apply to all programs and/or employment activities.)

If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at http://www.ascr.usda.gov/complaint_filing_cust.html, or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202) 690-7442 or email at program.intake@usda.gov.

Individuals who are deaf, hard of hearing, or have speech disabilities and wish to file either an EEO or program complaint please contact USDA through the Federal Relay Service at (800) 877-8339.

USDA is an equal opportunity provider and employer.