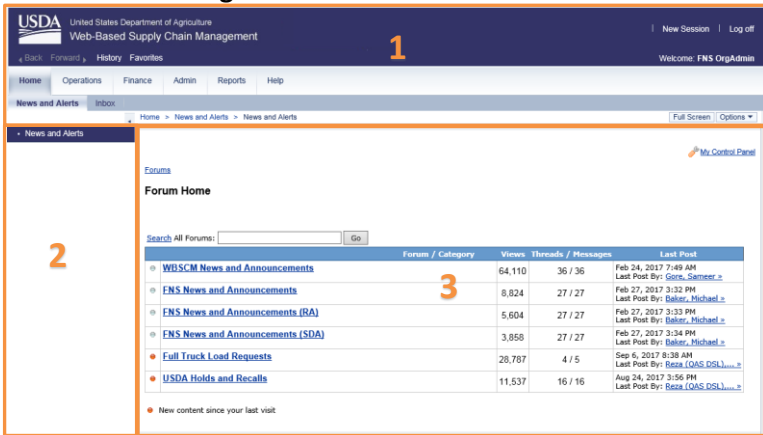




Purpose	This job aid provides the steps to add a WBSCM transaction as a Portal Favorite. WBSCM transactions that are used often can be saved as a Favorite . When you select a Favorite link, it directly opens the transaction. This job aid also reviews the steps to delete and maintain Favorites.
Target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

<p>WBSCM Home Page</p> 	<p>WBSCM Home Page Navigation</p> <p>The WBSCM Home Page is divided into the following three panels:</p> <ol style="list-style-type: none"> 1. The Portal Banner panel contains: <ul style="list-style-type: none"> • 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

The screenshot shows the WBSCM Home Page navigation menu. The 'Favorites' dropdown menu is open, showing options: 'Add to Favorites', 'Organize Favorites', 'Order Status Report', and 'Requisition Status Report'. The 'Add to Favorites' option is highlighted with a yellow box and a red '2'. In the main content area, the 'Received Shipment Report' transaction is highlighted with a red box and a red '1'. Below the main content area, there is a 'Favorites' dropdown menu with 'Add to Favorites', 'Organize Favorites', and 'Received Shipment Report' (highlighted with a red box and a red '3').

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.

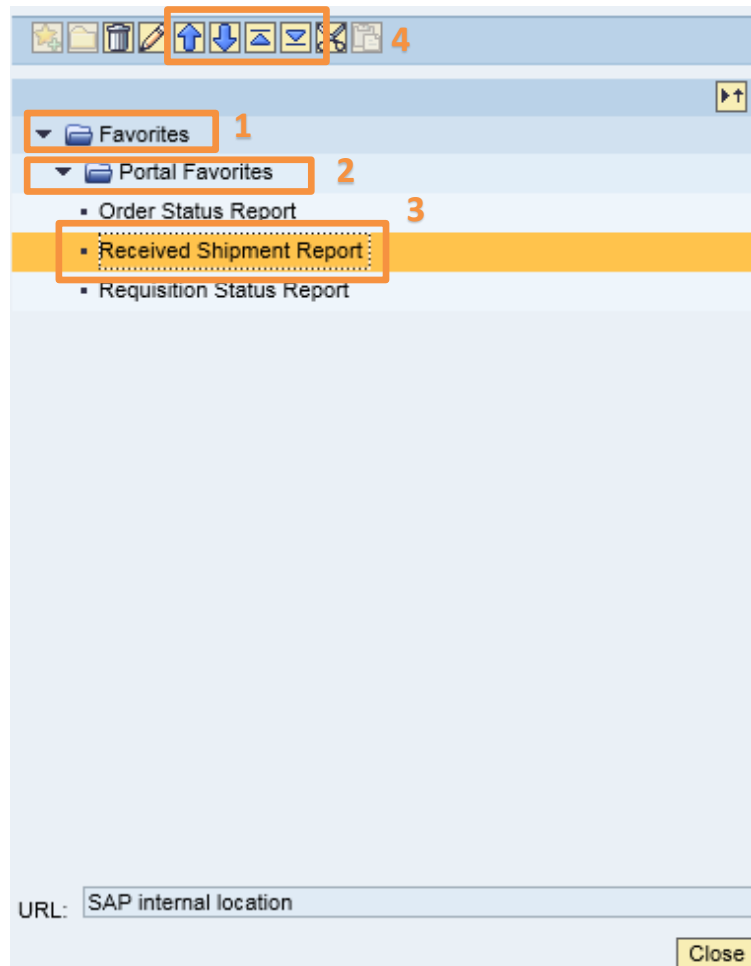
1. Navigate to the transaction to add as a Favorite
2. Create a Favorite using the **Favorites >Add to Favorites** portal path from the transaction.
3. The bookmarked transaction appears in the **Favorites** dropdown.



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

Organize Favorites



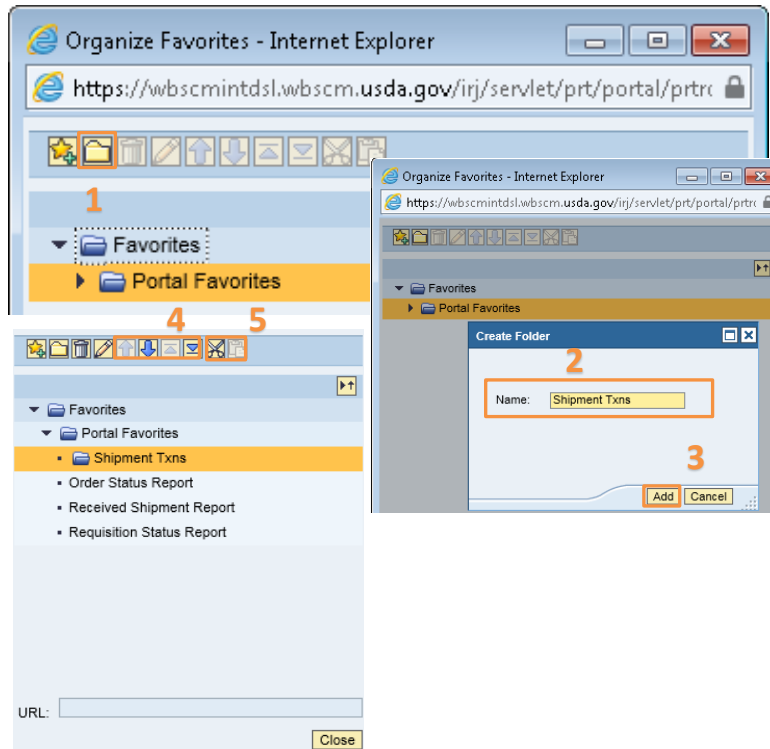
Sort Favorites

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.





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.

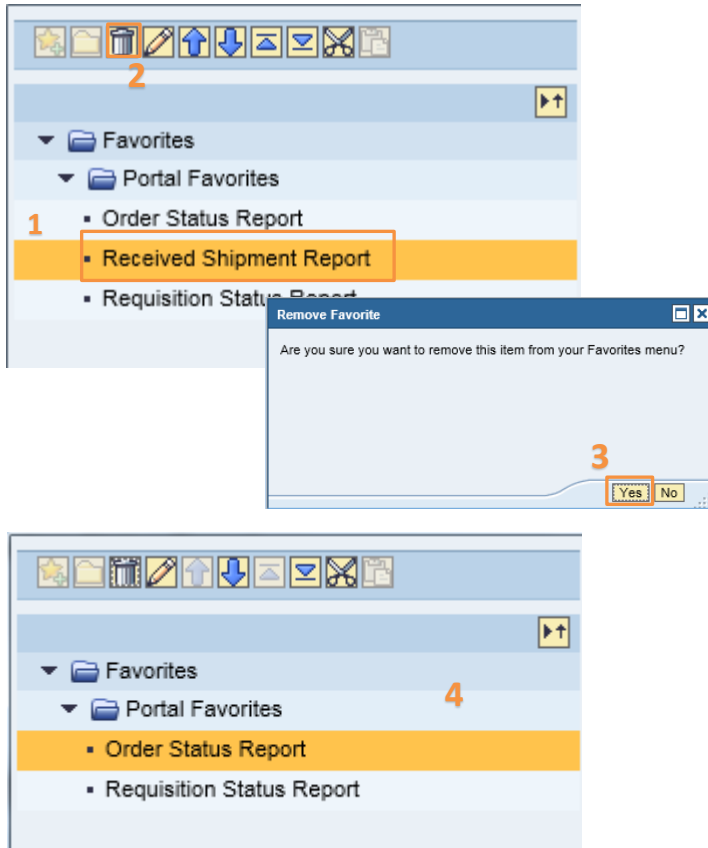
Start the transaction using the WBSM Portal path: **Favorites > Organize Favorites > Portal Favorites** link. The Organize Favorites window displays.

1. Click  (the **Create Folder** icon).
2. The **Create Folder** window displays. Type a new folder name in the **Name** field.
3. Click  (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



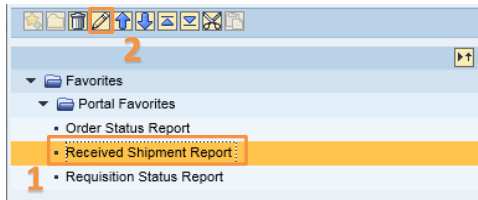
Delete a Favorite

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  (the **Yes** button).
4. The **Favorites** list displays without the deleted Favorite.



Organize Favorites



Rename a Favorite

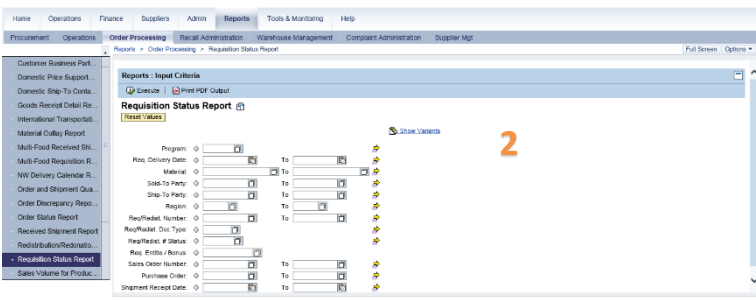
Use the Organize Favorites feature to sort the Favorites.

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  (the **Rename** button).
5. The renamed Favorite displays in the Favorites list.



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.