

WBARS 3.0 Support Session
October 9, 2026
1:00pm-2:00pm

Session hosted by WSHFC and Commerce, and assisted by staff from Intellectyx (IX), IT firm that maintains WBARS.

Summary of Session Questions and Answers:

Q: Management companies are having difficulty changing their contacts in WBARS. What are the WBARS admins allowed to do in the system?

A: Funders have identified that WBARS admin users do not have the same permissions as in WBARS 2.0. We have created a ticket for IX to identify the differences between the two systems and propose a fix so that PM company admins can easily edit contacts, assign different roles and easily associate contacts with properties.

Q: Is it possible for property management users to apply utility allowance changes through a Bulk UA function to change utility allowances across multiple projects at one time?

A: Yes, there is now a Bulk functions drop-down list with three different options. The first is "Bulk Utility Allowances" which will allow users to update UA's across multiple projects. If a user only wants to update allowances for a set of buildings in the same project, they can choose the second option, "Bulk Upload by Building". If a user only wants to make UA changes to a specific group of units within a project, then they can choose the last option, "Bulk Upload by Unit".

Q: Can I fix XML or Excel file import errors in WBARS 3.0?

A: Yes. After you have uploaded your file in WBARS, a list of errors will appear on screen. The location of each error is shown in the view box to the left of the Errors list view box to the right. Click on each error in the Errors list box; click on the field where you can enter the correct field value and enter the correct data. Then click the button next to the error and the error message should be removed from the display. Then you can go to the next error message(s) until you've updated all of them.

Q: Can **any** management company user edit one of the Table reports (1-5) or upload an XML or Excel file to populate the Table 1 report?

A: No. To edit any of the Table reports or to upload data into Table 1 via XML or Excel, you must be associated with the project. This means your name must appear under the "PM & OM Contacts" tab on the Sites page of a project. If you do not see your name on that tab, you can't edit any Table reports and you can't import data to Table 1.

Q: Are there any Help documents or information to help me use WBARS 3.0?

A: Yes. At the top of the screen near the user's contact record/profile icon (top right corner of screen), there is a "?" icon. General help topics can be accessed from this icon. There's also a **Help** button shown on most screens that provides information specific to the screen

you are on. The screen-specific **Help** button is typically located next to any Edit or Archive button visible on screen, located below the main WBARS ribbon at the very top.

Q: I'm a WBARS user but I can't see project details like buildings or units – what is going on?

A: If you are not associated with a project as either its Property Manager or Onsite Manager contact, then you currently cannot view this data. However, we have IX working on a fix to this, stay tuned for updates.

Q: I need to delete a household record in Table 1 – how do I do that?

A: There is no permanent delete function for household records in WBARS 3.0. Rather, users can choose to **Archive** a household record. Once a household record is archived, the unit status reverts to Empty/Vacant and the user can now create a new household record (using the New Move in function). Because the archive function does not permanently remove a record, any previously archived household record can also be restored to Table 1 if needed.

Q: In the Table 1 Data Readiness field, I see a status of “Incomplete”. I assume this means that I need to fix some errors, but I can't find any errors to fix – help!

A: This may be a bug, the user who reported the issue is going to forward us some screen shots and we'll open a ticket with IX to fix this. We will update users on this status once we have more information.

Q: The default year in WBARS appears to be the previous reporting year. I changed the report year filter to the current year. When I moved to another screen and then came back to my original screen, the filter had defaulted back to last year, rather than keeping my current year in the filter. Can this be fixed?

A: Yes, we are going to create a ticket for IX to either create different year filters depending on the user type (owners and managers vs. funder users) or to allow the user to make a permanent change to any filter so that the filter update is held until/unless the user manually updates the filter again. We'll provide an update after a fix has been applied.

Q: I can't tell what level each of my Tables is at – is there somewhere I can view this information?

A: Yes. Click on Report Submissions in the main WBARS ribbon at the very top of each page. All your projects will be in a list view on the screen. For each project, it will show the status of each Table under “Overall Status.” You can also scroll to the right to see each individual Table status. For example, Tables that have been submitted to Funder will show in green as “Submitted to Funder”. If they are at Owner or Property Manager level, the status will show in yellow as “Pending Owner” or “Pending PM.” If the status is “Not Started”, then the report is at your level (Property Manager or Onsite Manager Contact).