

## Purpose

The purpose of this work instruction is to demonstrate how to process a Worklist task.

## Trigger

Use this as a demonstration for performing a Worklist task

## Helpful Hints

- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

Note type	Icon	Description
A <b>general</b> note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A <b>cautionary</b> note		Use this note to communicate to the end-user of something that <b>MUST</b> be completed or another trigger that should be started and is related to the procedure.
A <b>critical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
<b>Contact</b> someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.

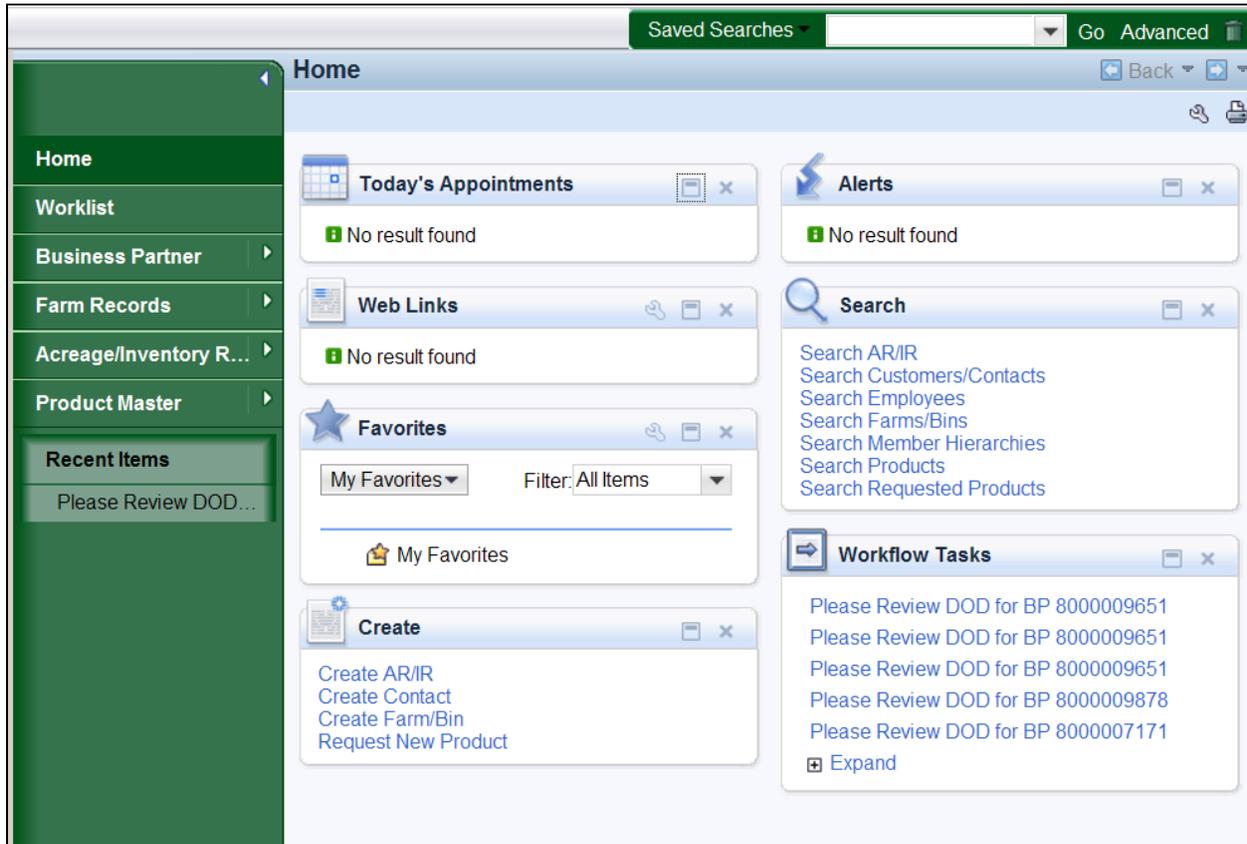
<p>A <b>reference</b> is available</p>		<p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p>
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**Procedure**

1. {Start the transaction from the MIDAS CRM Home Page.}

**MIDAS CRM Homepage**



2. Proceed to the "Home" Assignment block on the CRM homepage



UWL is available from the MIDAS Portal, CRM Navigation Bar, and the Workflow Tasks Assignment Block



## MIDAS CRM - Workflow Tasks Assignment Block

The screenshot shows the MIDAS CRM interface. On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Acreage/Inventory R..., Product Master, and Recent Items (Please Review DOD...). The main content area is titled 'Home' and contains several widgets: 'Today's Appointments' (No result found), 'Web Links' (No result found), 'Favorites' (My Favorites, Filter: All Items), 'Create' (Create AR/IR, Create Contact, Create Farm/Bin, Request New Product), 'Alerts' (No result found), 'Search' (Search AR/IR, Search Customers/Contacts, Search Employees, Search Farms/Bins, Search Member Hierarchies, Search Products, Search Requested Products), and 'Workflow Tasks'. The 'Workflow Tasks' widget lists several tasks, with the first one being 'Please Review DOD for BP 8000009651'.

3. Select Please Review DOD for BP 8000009651 link  
[Please Review DOD for BP 8000009651](#)



## MIDAS CRM - UWL Date of Death

The screenshot shows the MIDAS CRM interface in a Windows Internet Explorer browser window. The page title is 'SAP - [Home] - Windows Internet Explorer'. The header includes the USDA FSA logo, 'United States Department of Agriculture Farm Service Agency', and a welcome message for 'Gina Smith on DC5/140'. There are links for 'Personalize', 'Help Center', and 'System News'. A search bar contains 'Saved Searches' and a 'Go' button. The main content area is titled 'Home' and contains two paragraphs of instructions:

ACCEPT will set the Deceased Flag box with a checkmark confirming that the Customer is deceased.

DECLINE will remove the Date of Death from the Customer Profile Assignment Block field confirming that this Customer is NOT deceased.

Below the instructions are three sections:

- Associated Business Objects:** A table with two columns: 'Description' and 'Type'. The row contains '8000009651 EARL / FRANKLIN TX 77856-3529' and 'Business Partner'.
- Attachments:** A section with a 'New' button and an 'Add Note' button. It displays 'No result found'.
- Recipients:** A section with a right-pointing arrow and a house icon.

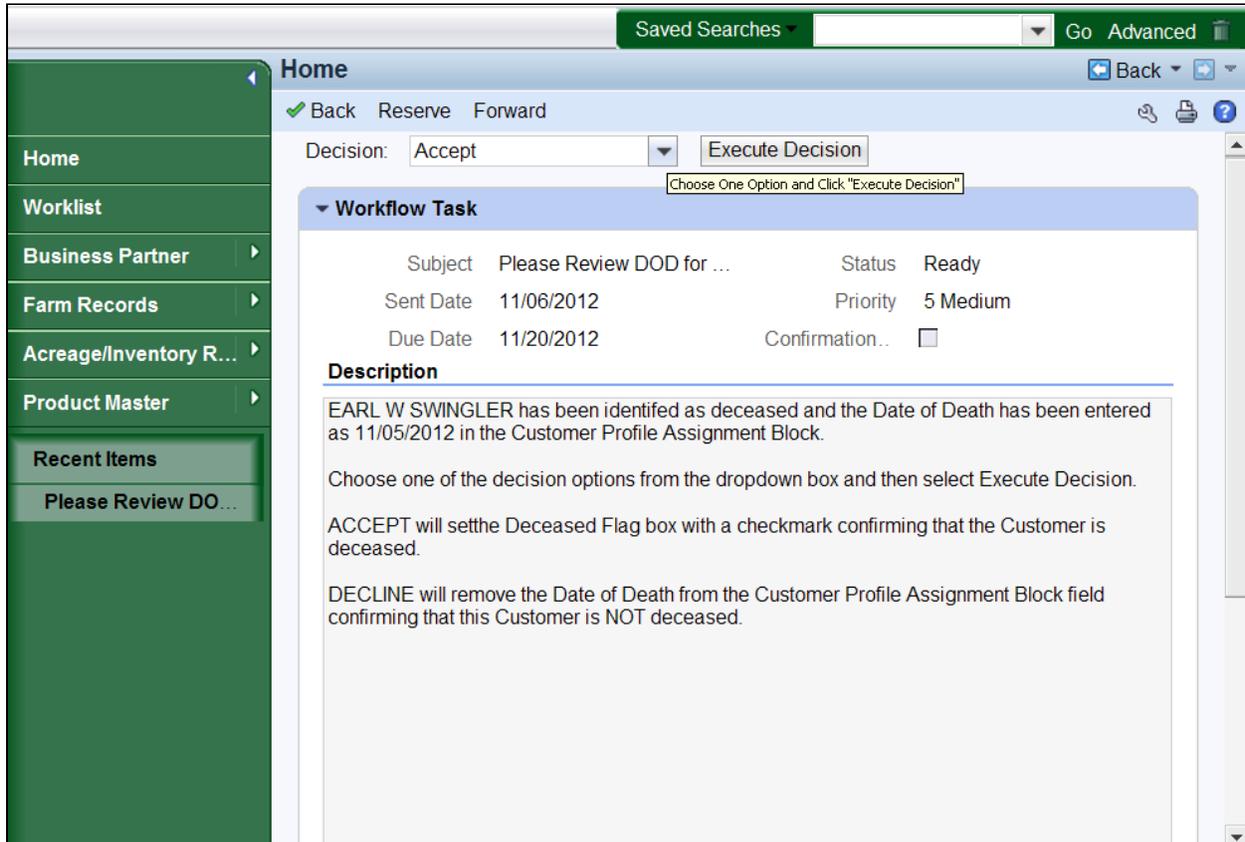
A left-hand navigation menu is visible, with 'Home' selected. Other menu items include 'Worklist', 'Business Partner', 'Farm Records', 'Acreage/Inventory R...', 'Product Master', and 'Recent Items'.

4. Click the Reserve [Reserve](#) link.



Select "Reserve" link to notify others that work is in progress.

## MIDAS CRM - Workflow Decision



Decision:

Choose One Option and Click "Execute Decision"

Subject	Please Review DOD for ...	Status	Ready
Sent Date	11/06/2012	Priority	5 Medium
Due Date	11/20/2012	Confirmation..	<input type="checkbox"/>

**Description**

EARL W SWINGLER has been identified as deceased and the Date of Death has been entered as 11/05/2012 in the Customer Profile Assignment Block.

Choose one of the decision options from the dropdown box and then select Execute Decision.

ACCEPT will set the Deceased Flag box with a checkmark confirming that the Customer is deceased.

DECLINE will remove the Date of Death from the Customer Profile Assignment Block field confirming that this Customer is NOT deceased.

5. Click the Decision dropdown list .



Once the user clicks the dropdown list, two selections will display (Accept or Decline). The user will choose the correct selection.



## MIDAS CRM - Workflow Accept

Decision: Accept Execute Decision

Workflow Accept Decline

Subject	Please Review DOD for ...	Status	Ready
Sent Date	11/06/2012	Priority	5 Medium
Due Date	11/20/2012	Confirmation..	<input type="checkbox"/>

**Description**

EARL W SWINGLER has been identified as deceased and the Date of Death has been entered as 11/05/2012 in the Customer Profile Assignment Block.

Choose one of the decision options from the dropdown box and then select Execute Decision.

ACCEPT will set the Deceased Flag box with a checkmark confirming that the Customer is deceased.

DECLINE will remove the Date of Death from the Customer Profile Assignment Block field confirming that this Customer is NOT deceased.

6. Select the Accept list item **Accept**.



## MIDAS CRM - Workflow Execute Decision

The screenshot shows the MIDAS CRM interface. On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Acreage/Inventory R..., Product Master, Recent Items, and Please Review DO... The main content area is titled 'Home' and contains a 'Decision:' dropdown menu with 'Accept' selected and an 'Execute Decision' button. Below this is a 'Workflow Task' section with a table of task details:

Workflow Task			
Subject	Please Review DOD for ...	Status	Ready
Sent Date	11/06/2012	Priority	5 Medium
Due Date	11/20/2012	Confirmation..	<input type="checkbox"/>

Below the table is a 'Description' section with the following text:

EARL W SWINGLER has been identified as deceased and the Date of Death has been entered as 11/05/2012 in the Customer Profile Assignment Block.

Choose one of the decision options from the dropdown box and then select Execute Decision.

ACCEPT will set the Deceased Flag box with a checkmark confirming that the Customer is deceased.

DECLINE will remove the Date of Death from the Customer Profile Assignment Block field confirming that this Customer is NOT deceased.

7. Click Execute Decision **Execute Decision** button.



## Home

8. Click the Home **Home** button.



## Result

You have successfully reviewed the Universal Worklist and completed a workflow task.



## Next Steps

You have %s.