

Purpose

The purpose of this work instruction is to show how to navigate the Universal Worklist (UWL).

Trigger

Perform this procedure when reviewing tasks, alerts, and notifications on the MIDAS Portal UWL.

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:

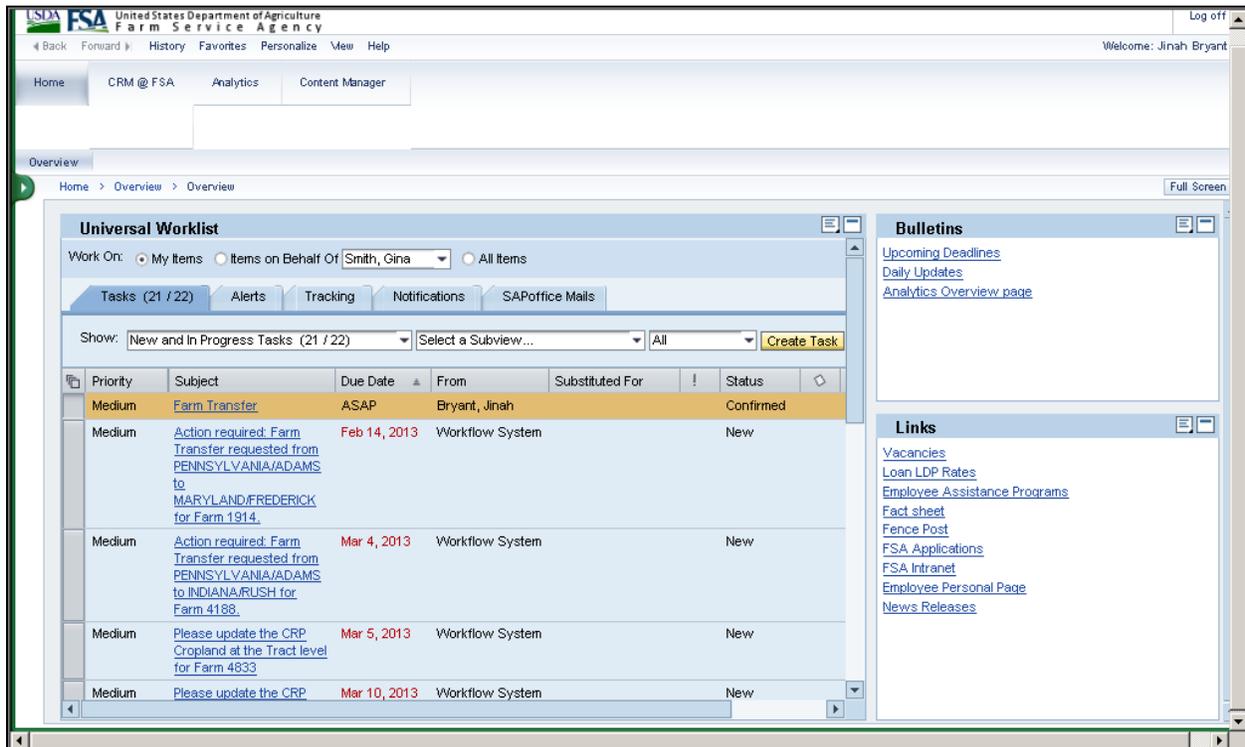
| Note type | Icon | Description |
|--------------------------------------|---|--|
| A general note of information |  | This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons. |
| A cautionary note |  | Use this note to communicate to the end-user of something that MUST be completed or another trigger that should be started and is related to the procedure. |
| A critical note |  | Use this note to specify something that MUST NOT be done during the procedure. |
| Contact 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. |
| A reference is available |  | Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document. |

Procedure

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

Overview - Farm Service Agency - Windows Internet Explorer



The screenshot shows the 'Universal Worklist' (UWL) interface in a Windows Internet Explorer browser window. The browser title is 'United States Department of Agriculture Farm Service Agency'. The user is logged in as 'Jinah Bryant'. The UWL interface includes a navigation bar with 'Home', 'CRM @ FSA', 'Analytics', and 'Content Manager'. Below the navigation bar, there is a 'Full Screen' button. The main content area displays a table of tasks with the following columns: Priority, Subject, Due Date, From, Substituted For, and Status. The tasks are as follows:

| Priority | Subject | Due Date | From | Substituted For | Status |
|----------|---|--------------|-----------------|-----------------|-----------|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | Confirmed |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | New |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to INDIANA/RUSH for Farm 4188. | Mar 4, 2013 | Workflow System | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Mar 5, 2013 | Workflow System | | New |
| Medium | Please update the CRP | Mar 10, 2013 | Workflow System | | New |

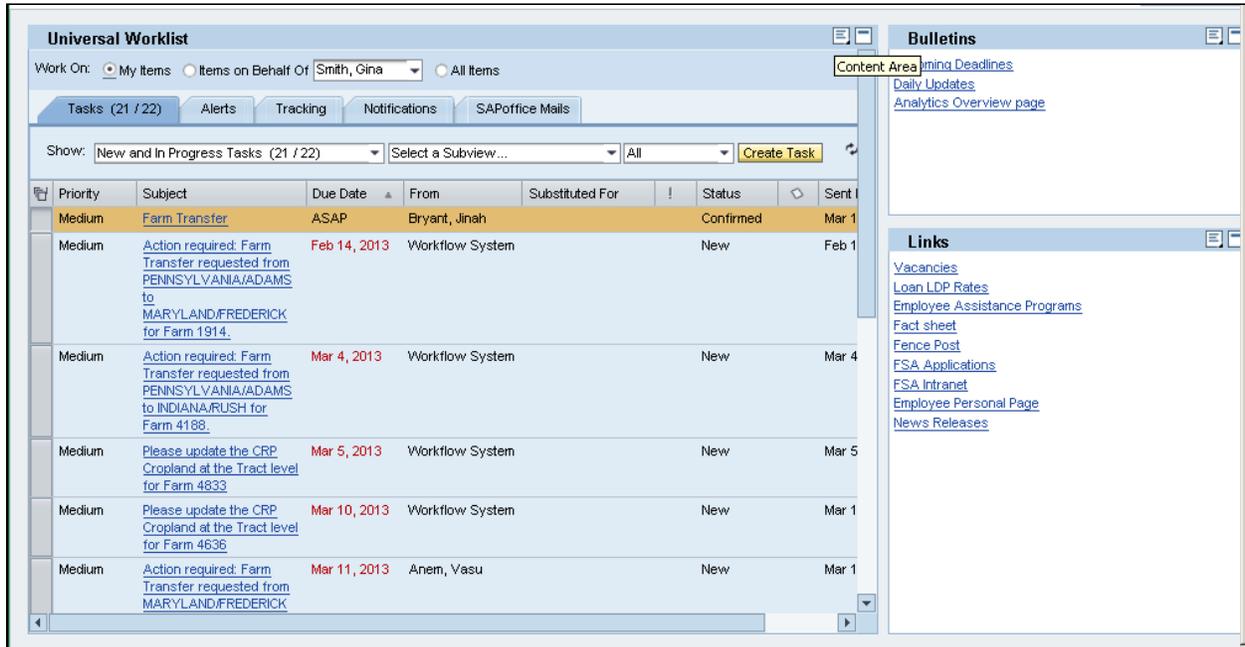
On the right side of the UWL, there are two panels: 'Bulletins' and 'Links'. The 'Bulletins' panel contains links for 'Upcoming Deadlines', 'Daily Updates', and 'Analytics Overview page'. The 'Links' panel contains links for 'Vacancies', 'Loan LDP Rates', 'Employee Assistance Programs', 'Fact sheet', 'Fence Post', 'FSA Applications', 'FSA Intranet', 'Employee Personal Page', and 'News Releases'.

2. Click Full Screen button [Full Screen](#) to expand the UWL screen.



The Universal Worklist is located on the MIDAS Portal. UWL is designed to be a hub for all workflow activity.

Overview - Farm Service Agency - Windows Internet Explorer



Universal Worklist

Work On: My Items Items on Behalf Of Smith, Gina All Items

Tasks (21 / 22) Alerts Tracking Notifications SAPoffice Mails

Show: New and In Progress Tasks (21 / 22) Select a Subview... All Create Task

| Priority | Subject | Due Date | From | Substituted For | Status | Sent |
|----------|---|--------------|-----------------|-----------------|-----------|-------|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | Confirmed | Mar 1 |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | New | Feb 1 |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to INDIANA/RUSH for Farm 4188. | Mar 4, 2013 | Workflow System | | New | Mar 4 |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Mar 5, 2013 | Workflow System | | New | Mar 5 |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4636 | Mar 10, 2013 | Workflow System | | New | Mar 1 |
| Medium | Action required: Farm Transfer requested from MARYLAND/FREDERICK | Mar 11, 2013 | Anem, Vasu | | New | Mar 1 |

Bulletins

Content Area [Timing Deadlines](#)
[Daily Updates](#)
[Analytics Overview page](#)

Links

[Vacancies](#)
[Loan LDP Rates](#)
[Employee Assistance Programs](#)
[Fact sheet](#)
[Fence Post](#)
[FSA Applications](#)
[FSA Intranet](#)
[Employee Personal Page](#)
[News Releases](#)

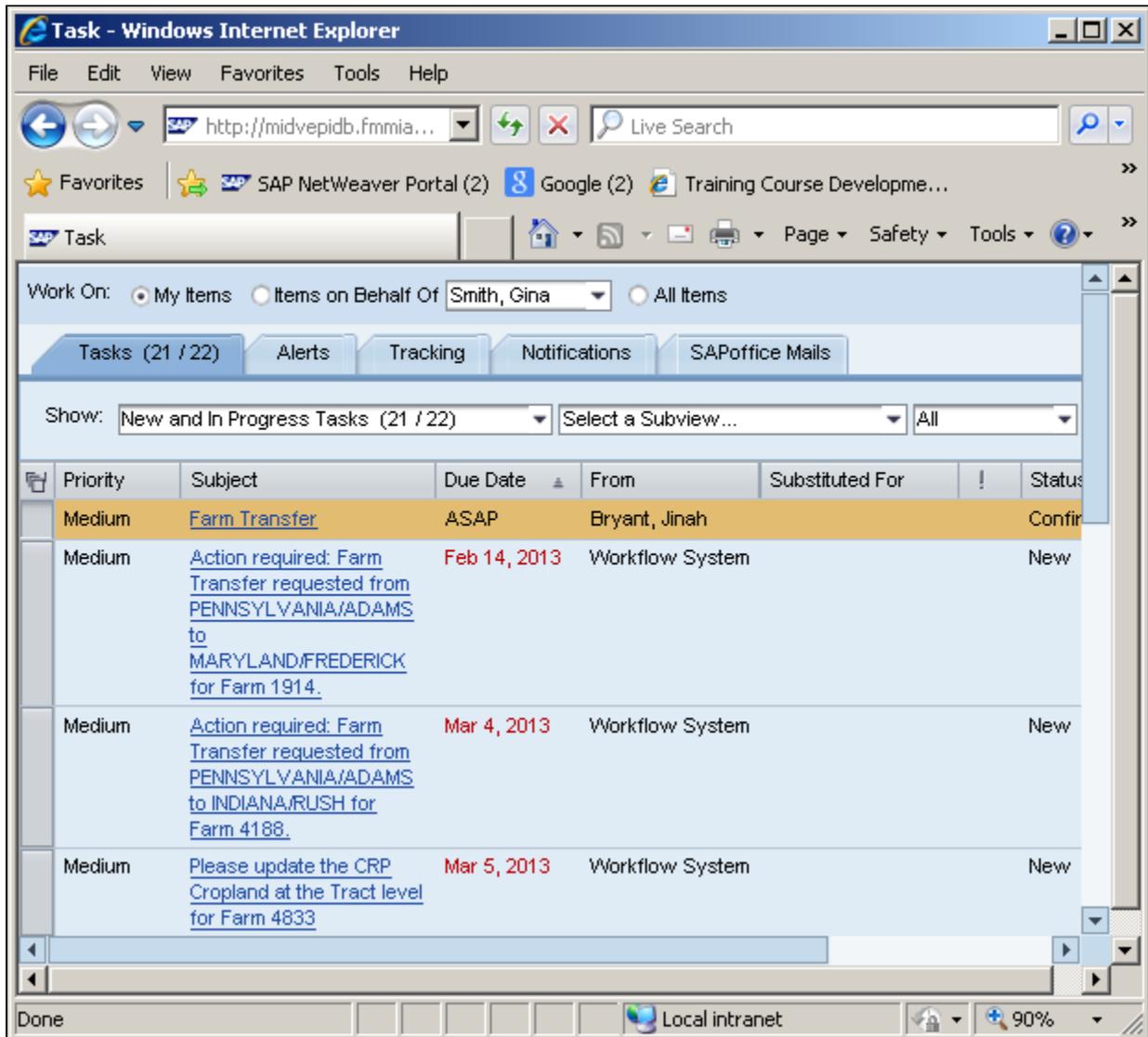
3. Click the Content Area button .

4. Click Open in New Window menu item .



You can open the UWL in a new window to maximize your view.

Task - Windows Internet Explorer



Task - Windows Internet Explorer

File Edit View Favorites Tools Help

http://midvepidb.fmmia... Live Search

SAP NetWeaver Portal (2) Google (2) Training Course Developme...

SAP Task

Work On: My Items Items on Behalf Of Smith, Gina All Items

Tasks (21 / 22) Alerts Tracking Notifications SAPoffice Mails

Show:

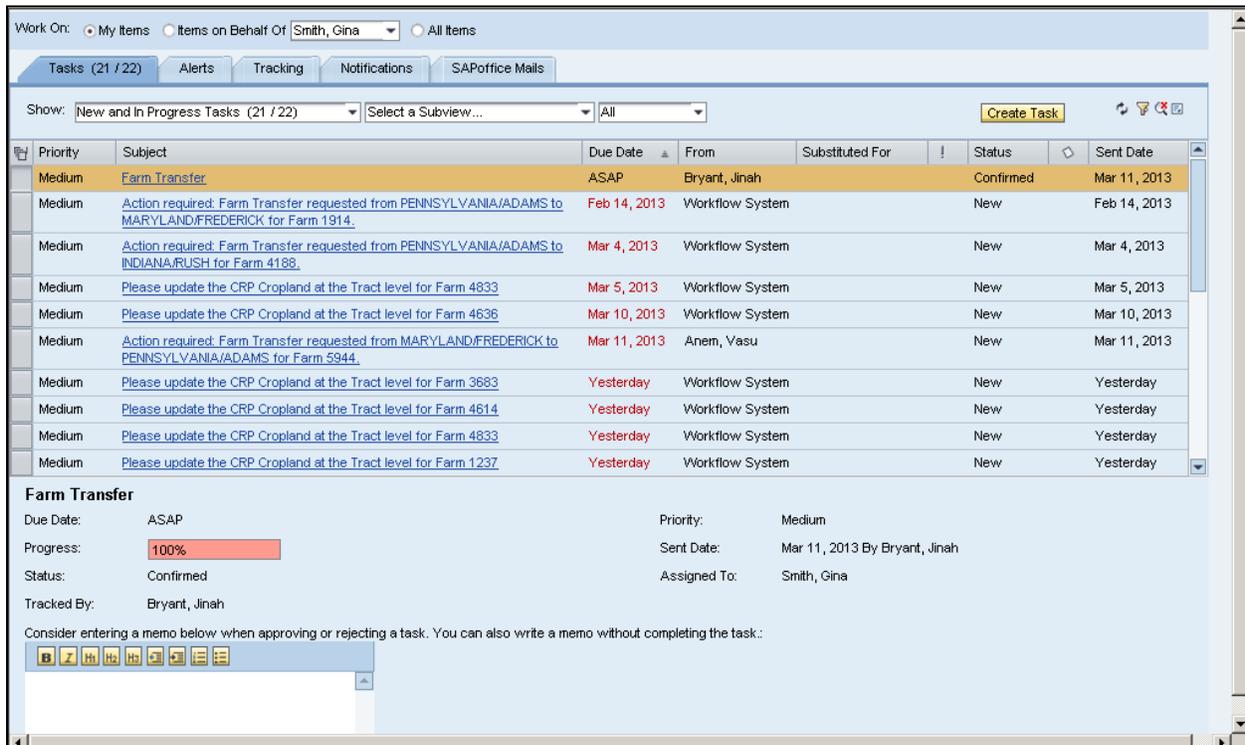
| Priority | Subject | Due Date | From | Substituted For | Status |
|----------|---|--------------|-----------------|-----------------|--------|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | Confir |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | New |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to INDIANA/RUSH for Farm 4188. | Mar 4, 2013 | Workflow System | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Mar 5, 2013 | Workflow System | | New |

Done Local intranet 90%

5. Click Maximize button .

 Notice the UWL is expanded to the entire screen.

Task - Windows Internet Explorer



| Priority | Subject | Due Date | From | Substituted For | Status | Sent Date |
|----------|---|--------------|-----------------|-----------------|-----------|--------------|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | Confirmed | Mar 11, 2013 |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | New | Feb 14, 2013 |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to INDIANA/RUSH for Farm 4188. | Mar 4, 2013 | Workflow System | | New | Mar 4, 2013 |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Mar 5, 2013 | Workflow System | | New | Mar 5, 2013 |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4636 | Mar 10, 2013 | Workflow System | | New | Mar 10, 2013 |
| Medium | Action required: Farm Transfer requested from MARYLAND/FREDERICK to PENNSYLVANIA/ADAMS for Farm 5944. | Mar 11, 2013 | Anem, Vasu | | New | Mar 11, 2013 |
| Medium | Please update the CRP Cropland at the Tract level for Farm 3683 | Yesterday | Workflow System | | New | Yesterday |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4614 | Yesterday | Workflow System | | New | Yesterday |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Yesterday | Workflow System | | New | Yesterday |
| Medium | Please update the CRP Cropland at the Tract level for Farm 1237 | Yesterday | Workflow System | | New | Yesterday |

Farm Transfer

Due Date: ASAP Priority: Medium

Progress: 100%

Status: Confirmed Sent Date: Mar 11, 2013 By Bryant, Jinah

Tracked By: Bryant, Jinah Assigned To: Smith, Gina

Consider entering a memo below when approving or rejecting a task. You can also write a memo without completing the task:

6. Click Tasks (21 / 22) label **Tasks (21 / 22)**.

 The Tasks tab consists of Workflow Tasks and tasks created in the UWL.

All Workflow tasks will be processed in CRM Worklist.

7. Click Show: text box  to view the drop down.

8. Click Show: text box .

 The Show dropdown on each tab allows you to filter the UWL view.

9. Click Show: text box .

10. Click Alerts tab **Alerts** to view the Alerts in the UWL.

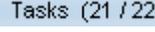
 The Show dropdown allows you to filter tasks that are new to your worklist, being worked, on deadline, and overdue in the UWL view.

11. Click Tracking tab **Tracking** to view Tasks status in the UWL

 The Alerts tab shows all Alerts. Alerts can be viewed in the UWL but must be processed in the CRM Worklist.

12. Click Notifications tab  to proceed.

 The Tracking tab shows the status of tasks created in the UWL.

13. Click Tasks (21/22) tab  to proceed.

 Some users may receive Notifications as reminders of Missed Deadlines.

14. Click the Refresh icon .

 The UWL will refresh in 5 minute intervals. Select the refresh icon to update a specific tab immediately.

15. Click the Filter icon .

16. Click the dropdown button  to view filtering options under the selected column.

17. Click Last 7 Days  menu item.

18. Click the drop down menu icon .

 Only Tasks due within the last 7 days are displayed.

19. Click the blank menu item to return to default setting.

20. Click Advanced Filter icon  to end filtering.

21. Click the Preview icon .

 The Preview Icon displays and hides detail of a selection at the bottom of the screen.

22. Click the UWL menu icon .

23. Click the Refresh menu item .



Task - Windows Internet Explorer

Work On: My Items Items on Behalf Of Smith, Gina All Items

Tasks (21 / 22) Alerts (1 / 2) Tracking (3) Notifications (35 / 35) SAPoffice Mails

Show: New and In Progress Tasks (21 / 22) Select a Subview... All Create Task Refresh Personalize View Manage Substitution Rules Display Connection Status

| Priority | Subject | Due Date | From | Substituted For | ! | Statu |
|----------|---|--------------|-----------------|-----------------|---|-------|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | | Conf |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | | New |
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| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Mar 5, 2013 | Workflow System | | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4636 | Mar 10, 2013 | Workflow System | | | New |
| Medium | Action required: Farm Transfer requested from MARYLAND/FREDERICK to PENNSYLVANIA/ADAMS for Farm 5944. | Mar 11, 2013 | Anem, Vasu | | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 3683 | Yesterday | Workflow System | | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4614 | Yesterday | Workflow System | | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Yesterday | Workflow System | | | New |
| Medium | Please update the CRP Cropland at the Tract level for Farm 1237 | Yesterday | Workflow System | | | New |

Please update the CRP Cropland at the Tract level for Farm 4636

Priority: Medium Due Date: Mar 10, 2013

Status: New Sent Date: Mar 10, 2013 By Workflow System

Description:

Dear User,
CRP data pertaining to farm record 4636 has been updated and requires allocation of the updated acres to the Tract level. Please navigate to this farm record using the link below in Associated Business Objects assignment block and allocate 10,60 and 1,50 acres to the Tract level(s) as appropriate.

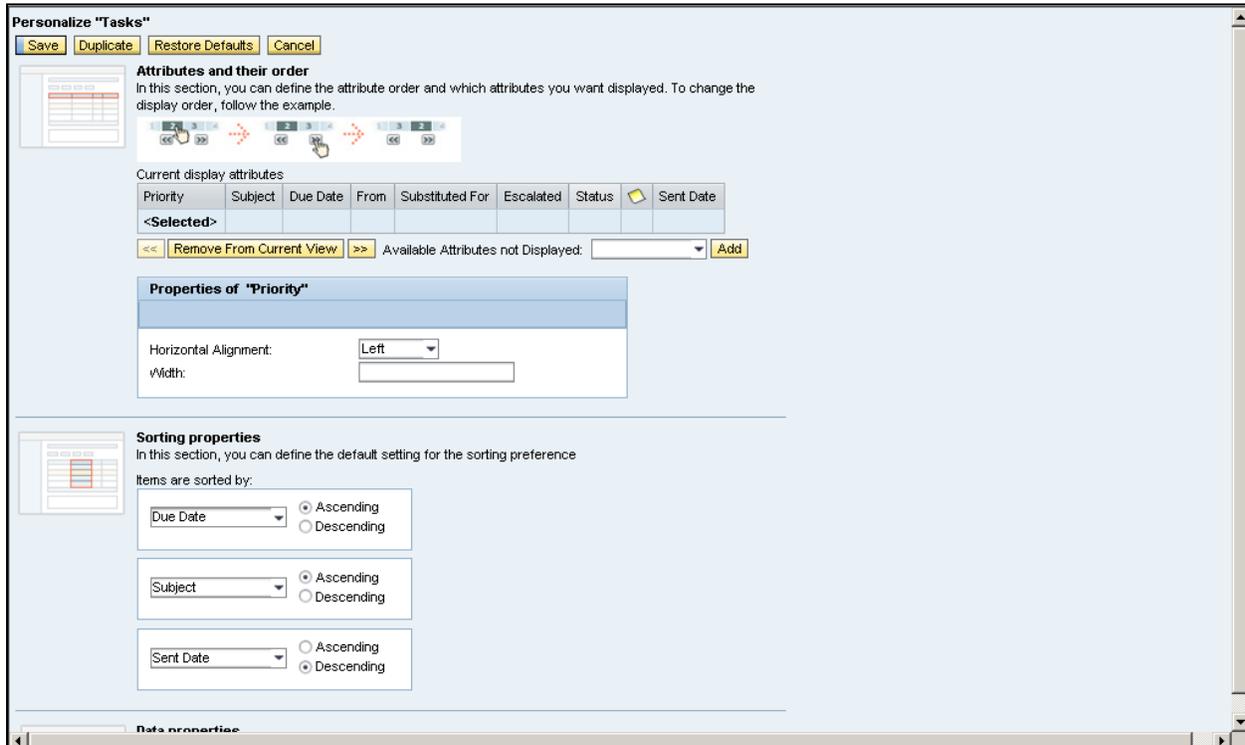
Farm Number: 4636

24. Click the Personalize View menu item Personalize View.



The Personalize View allows you to customize your UWL view.

Task - Windows Internet Explorer



25. Click the Status label .

 You can organize columns and add attributes in Personalize "Tasks" view.

Click the Restore Defaults button to return view to the default setting.

26. Click << button .

27. Click Available Attributes not Displayed: text box .

28. Click Available Attributes not Displayed: drop down  icon.

 The drop down menu will display the available choices.

Click on your choice to select an attribute not currently displayed.

29. Click the Restore Defaults button  to return to the system default attributes.

 The drop down menu will display the available choices.

Click on your choice to select an attribute not currently displayed.

Task - Windows Internet Explorer



30. Click the Yes button **Yes** to restore the system defaults.

Overview - Farm Service Agency - Windows Internet Explorer

Work On: My Items Items on Behalf Of Smith, Gina All Items

Tasks (21 / 22) Alerts (1 / 2) Tracking (1 / 4) Notifications (35 / 35) SAPoffice Mails

Show: New and In Progress Tasks (21 / 22) Select a Subview... All **Create Task**

| Priority | Subject | Due Date | From | Substituted For | Status | Ser |
|----------|---|--------------|-----------------|-----------------|-----------|-----|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | Confirmed | Mar |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | New | Feb |
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| Medium | Please update the CRP Cropland at the Tract level for Farm 4636 | Mar 10, 2013 | Workflow System | | New | Mar |
| Medium | Action required: Farm Transfer requested from MARYLAND/FREDERICK to | Mar 11, 2013 | Anem, Vasu | | New | Mar |

31. Click the Create Task button **Create Task**.



You can create and assign a Task in the UWL.

SAP NetWeaver Portal - Windows Internet Explorer

Task Type:

Create Task

Task is a request to one or more assignees. Under "More Options", you can determine whether the task is issued to multiple users or to each user individually. You can also specify whether the task has to be approved before it can be closed.

Title: *

Assigned To:

Priority: Due: ASAP

Description:

B **Z** **H1** **H2** **H3** **U** **LI** **UL** **OL** **LO**

[More Options](#)

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

| Field | R/O/C | Description |
|-------|-------|-------------|
|-------|-------|-------------|



| Field | R/O/C | Description |
|--------------|-------|---------------------------------|
| Title: | R | Example: Substitution |
| Assigned To: | R | Example: Gina Smith |

33. Click Priority: drop down menu icon ▾.

34. Click the **High** menu item.

35. Click Due: check box .

SAP NetWeaver Portal - Windows Internet Explorer



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

| Field | R/O/C | Description |
|-------|-------|----------------------------------|
| | R | Example: Please add me |

SAP NetWeaver Portal - Windows Internet Explorer

Task Type:

Create Task

Task is a request to one or more assignees. Under "More Options", you can determine whether the task is issued to multiple users or to each user individually. You can also specify whether the task has to be approved before it can be closed.

Title: *

Assigned To:

Priority: Due: ASAP

Description:

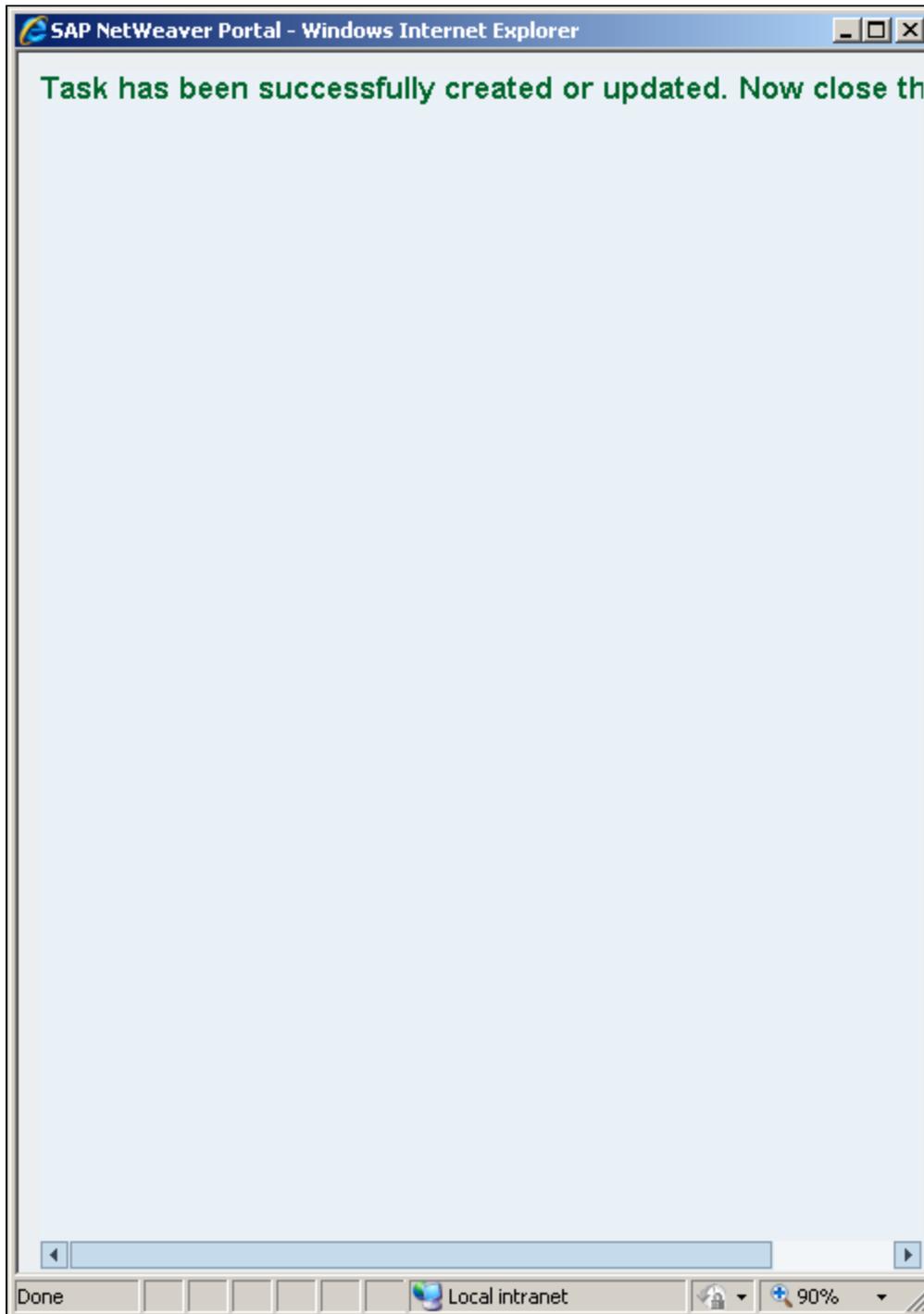
B **Z** **H1** **H2** **H3** **U** **LI** **UL**

Please add me |

[More Options](#)

37. Click the Send button .

SAP NetWeaver Portal - Windows Internet Explorer



38. Click the Close icon .

 Note the system message; the task has been successfully created or



updated.

Overview - Farm Service Agency - Windows Internet Explorer

Work On: My Items Items on Behalf Of Smith, Gina All Items

Tasks (21 / 22) Alerts (1 / 2) Tracking (1 / 4) Notifications (35 / 35) SAPoffice Mails

Show: New and In Progress Tasks (21 / 22) Select a Subview... All Create Task

| Priority | Subject | Due Date | From | Substituted For | ! | Status | Ser |
|----------|---|--------------|-----------------|-----------------|---|-----------|-----|
| Medium | Farm Transfer | ASAP | Bryant, Jinah | | | Confirmed | Mar |
| Medium | Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914. | Feb 14, 2013 | Workflow System | | | New | Fek |
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| Medium | Please update the CRP Cropland at the Tract level for Farm 4833 | Mar 5, 2013 | Workflow System | | | New | Mar |
| Medium | Please update the CRP Cropland at the Tract level for Farm 4636 | Mar 10, 2013 | Workflow System | | | New | Mar |
| Medium | Action required: Farm Transfer requested from MARYLAND/FREDERICK to | Mar 11, 2013 | Anem, Vasu | | | New | Mar |

39. Click Tracking (1 / 4) label Tracking (1 / 4).



Notice the Task appears on the Tracking tab.

40. Click the Substitution link Substitution.



Task - Farm Service Agency - Windows Internet Explorer

41. Click the Return button **Return**.

Overview - Farm Service Agency - Windows Internet Explorer

| Priority | Subject | Due Date | Sent Date | Status | From |
|----------|----------------------------|----------|--------------|-----------|---------------|
| High | Substitution | ASAP | Today | New | Bryant, Jinah |
| High | Farm Transfer | ASAP | Today | New | Bryant, Jinah |
| Medium | Farm Transfer | ASAP | Mar 11, 2013 | Confirmed | Bryant, Jinah |
| Medium | Create Substitution | ASAP | Mar 5, 2013 | Completed | Bryant, Jinah |
| Medium | Farm Workflow notification | | Jan 14, 2013 | Completed | Bryant, Jinah |



42. Click the Close Full Screen button [Close Full Screen](#).
43. Click the Home link [Home](#) to return to the main screen.



Result

You have successfully navigated the UWL.



Next Steps