

Purpose

The purpose of this work instruction is to show users how to create and maintain substitutions in the Portal UWL and the CRM Worklist.

Trigger

Perform this procedure when assigning or taking over as a delegate to manage workflow transactions.

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

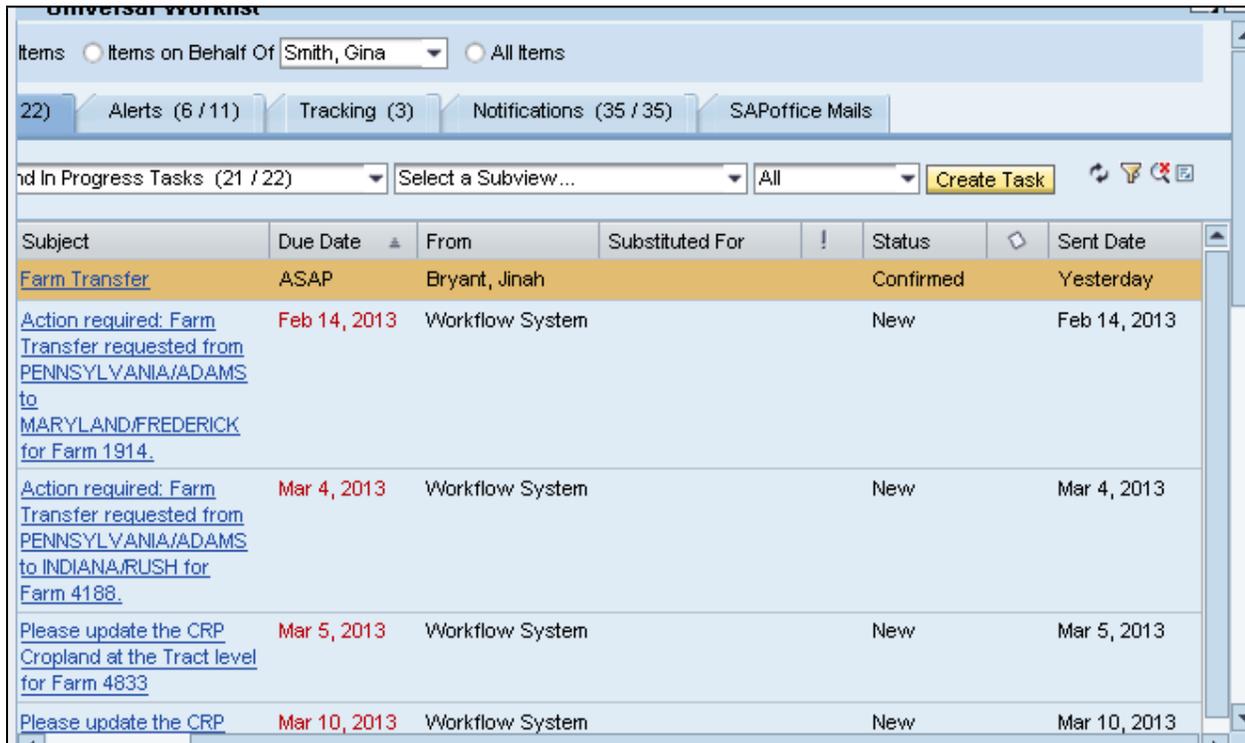


		procedure.
A reference is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

Procedure

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

Overview - Farm Service Agency - Windows Internet Explorer



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

2. Click button .



Substitution is the process used to delegate authority in the Worklist. Substitutions are best managed in the UWL.

3. Click Manage Substitution Rules menu .

SAP NetWeaver Portal - Windows Internet Explorer

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ...
Delete
Refresh

☰	Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off	

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over	
Smith, Gina	All	Fill In	Ongoing	Take over	

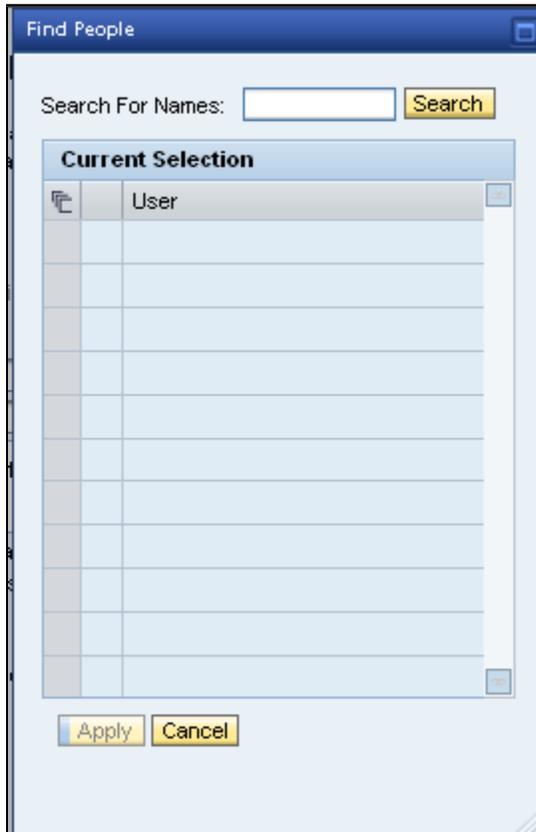
4. Click Create Rule  button.

5. Click Select  button.



You can type the name into the Nominee field or Click Select to search.

SAP NetWeaver Portal - Windows Internet Explorer



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

Field	R/O/C	Description
Search For Names:	R	Example: Gina Smith

 You can enter any portion of the name to search.

7. Click Search  button.
8. Click label .
9. Click Apply  button.

SAP NetWeaver Portal - Windows Internet Explorer

Create a Substitution Rule

You can define which tasks you want to assign to a assignee. You can either make the assignee receive your tasks (for example, when you go on vacation), or you can allow the assignee to fill in for you (for example, in case you are unexpectedly absent).

1 **Define Rule**

2 Set Rule Activation

Nominee:

Assign These Tasks:

The nominee is the substitute for all tasks

I Want the Nominee to: Receive My Tasks
You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule

Fill In For Me
If you are unexpectedly absent, the assignee can take over your tasks completely.

10. Click Fill In For Me radio button Fill In For Me.



Select Receive My Tasks to have a delegate receive your tasks for a scheduled amount of time.

Fill In for me allows a delegate to take over your task unexpectedly.

11. Click Next button .

12. Click Save button .

SAP NetWeaver Portal - Windows Internet Explorer

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My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
All	Smith, Gina	Fills In For Me	Ongoing	Successful	Turn Off

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over
Smith, Gina	All	Fill In	Ongoing	Take over

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13. Click Close button .



Overview - Farm Service Agency - Windows Internet Explorer

Universal Worklist

Items Items on Behalf Of Smith, Gina All Items

22) Alerts (6 / 11) Tracking (3) Notifications (35 / 35) SAPoffice Mails

In Progress Tasks (21 / 22) Select a Subview... All Create Task

Subject	Due Date	From	Substituted For	Status	Sent Date
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Action required: Farm Transfer requested from PENNSYLVANIA/ADAMS to MARYLAND/FREDERICK for Farm 1914.	Feb 14, 2013	Workflow System		New	Feb 14, 2013
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Please update the CRP Cropland at the Tract level for Farm 4833	Mar 5, 2013	Workflow System		New	Mar 5, 2013
Please update the CRP	Mar 10, 2013	Workflow System		New	Mar 10, 2013

14. Click button .



You can also manage Substitutions assigned to you in the UWL.

15. Click Manage Substitution Rules menu item Manage Substitution Rules.

SAP NetWeaver Portal - Windows Internet Explorer

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Create Rule ...
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☐	Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
	All	Smith, Gina	Fills In For Me	Ongoing	Successful	Turn Off

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over
Smith, Gina	All	Fill In	Ongoing	Take over

16. Click Take over Take over button to manage another user's task.



When managing Other User's Substitution Rules, you can **Take over** or **End Take over** when needed.



SAP NetWeaver Portal - Windows Internet Explorer

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Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
All	Smith, Gina	Fills In For Me	Ongoing	Successful	Turn Off

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over
Smith, Gina	All	Fill In	Ongoing	End take-over

Local intranet 90%

17. Click Close button .



Overview - Farm Service Agency - Windows Internet Explorer

Universal Worklist

⚠ Substitution is currently turned on. You can turn off substitution under Manage Substitution Rules

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

Tasks (21 / 22) Alerts (6 / 11) Tracking (3) 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
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

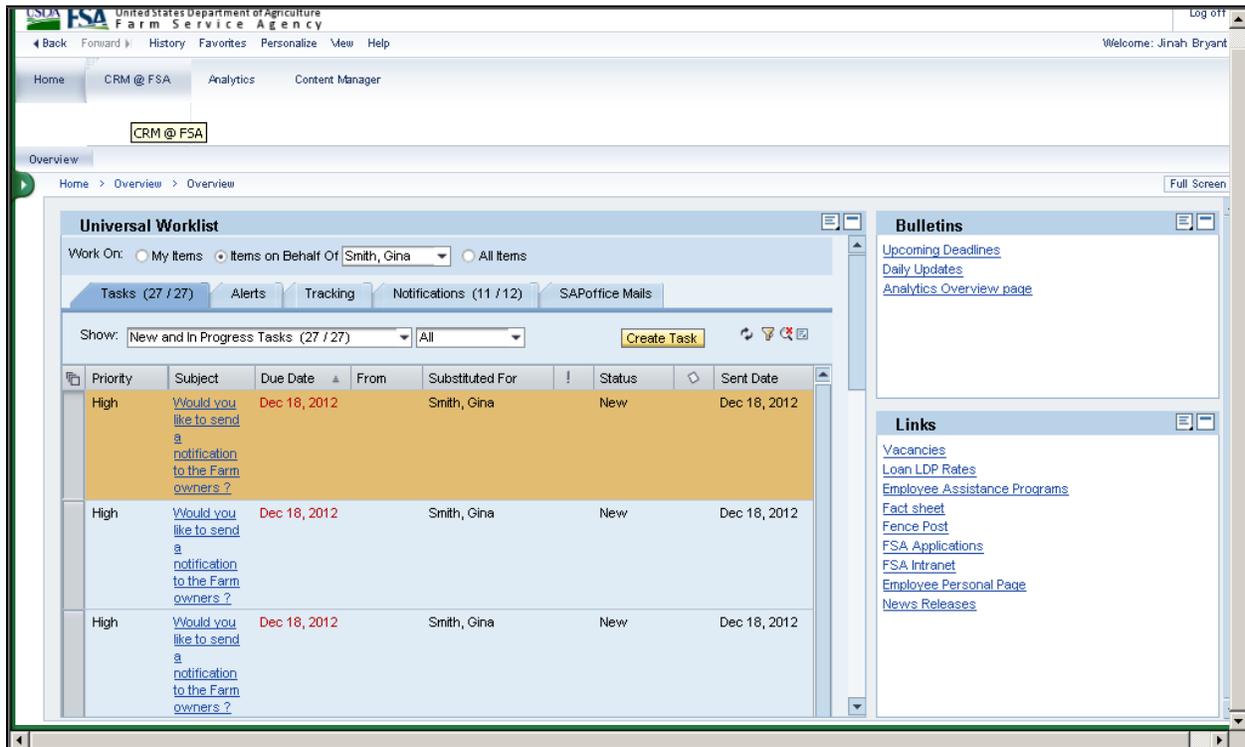
18. Click My Items radio button My Items.

 Click My Items to only see task assigned to you.

19. Click Items on Behalf Of radio button Items on Behalf Of Smith, Gina.

 Select **Items on Behalf of** to only see another user's task

Overview - Farm Service Agency - Windows Internet Explorer



CRM @ FSA

Overview

Home > Overview > Overview

Full Screen

Universal Worklist

Work On: My Items Items on Behalf Of All Items

Tasks (27 / 27) Alerts Tracking Notifications (11 / 12) SAPoffice Mails

Show: New and In Progress Tasks (27 / 27) All [Create Task](#)

Priority	Subject	Due Date	From	Substituted For	Status	Sent Date
High	Would you like to send a notification to the Farm owners ?	Dec 18, 2012	Smith, Gina	Smith, Gina	New	Dec 18, 2012
High	Would you like to send a notification to the Farm owners ?	Dec 18, 2012	Smith, Gina	Smith, Gina	New	Dec 18, 2012
High	Would you like to send a notification to the Farm owners ?	Dec 18, 2012	Smith, Gina	Smith, Gina	New	Dec 18, 2012

Bulletins

[Upcoming 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](#)

20.

Click CRM @ FSA label



The UWL is an excellent tool to manage substitutions, search and review workflow items. However in this release you must go to [CRM@FSA](#) to complete tasks and alerts



Home

The screenshot shows the MIDAS Home dashboard with a green sidebar on the left containing navigation options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area features several widgets:

- Workflow Tasks:** A list of five "Missed Deadline: Please update the CRP Cr..." items with an "Expand" button.
- Alerts:** A table with columns for alert type, date, and count. The table contains five rows of "CREATION OF FARM REC..." alerts from 11.0...
- Web Links:** A section stating "No result found".
- Favorites:** A section with a "My Favorites" dropdown and a "Filter: All Items" dropdown.
- Search:** A search bar with a magnifying glass icon and a list of search options: Search Customers/Contacts, Search Employees, Search Farms/Bins, Search Member Hierarchies, Search Products, and Search Requested Products.
- Create:** A section with a plus icon and two options: Create Farm/Bin and Request New Product.

21. Click Worklist button 



Worklist

Worklist

Alerts | Personalize Alerts

Due	Description	Sent Date	Expiration Date	Priority
▲	CREATION OF FARM RECORDS IN NON...	11.03.2013	12.03.2013	High
▲	CREATION OF FARM RECORDS IN NON...	11.03.2013	12.03.2013	High
▲	CREATION OF FARM RECORDS IN NON...	11.03.2013	12.03.2013	High
▲	CREATION OF FARM RECORDS IN NON...	12.03.2013	13.03.2013	High
▲	CREATION OF FARM RECORDS IN NON...	12.03.2013	13.03.2013	High

Workflow Tasks | Personalize Workflow Tasks

D...	Subject	Sent...	Due...	Priority	Associated...	Process	Sub...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...
●	Missed Deadline:Please u...	12.0...		5 Me...	Farm 18-1...	Far...	Appr...

22. Click Personalize Workflow Tasks button **Personalize Workflow Tasks**.



Workflow Task Personalization

23. Click Edit List [Edit List](#) button.



You can view, edit and create Substitutions in CRM

24. Click Add Employee button [Add Employee](#).

Search Criteria



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

Field	R/O/C	Description
	R	Example: pedireddy

26. Click Search button .

Search Criteria

Search Criteria [Hide Search Fields](#)

Last Name is

First Name is

User is

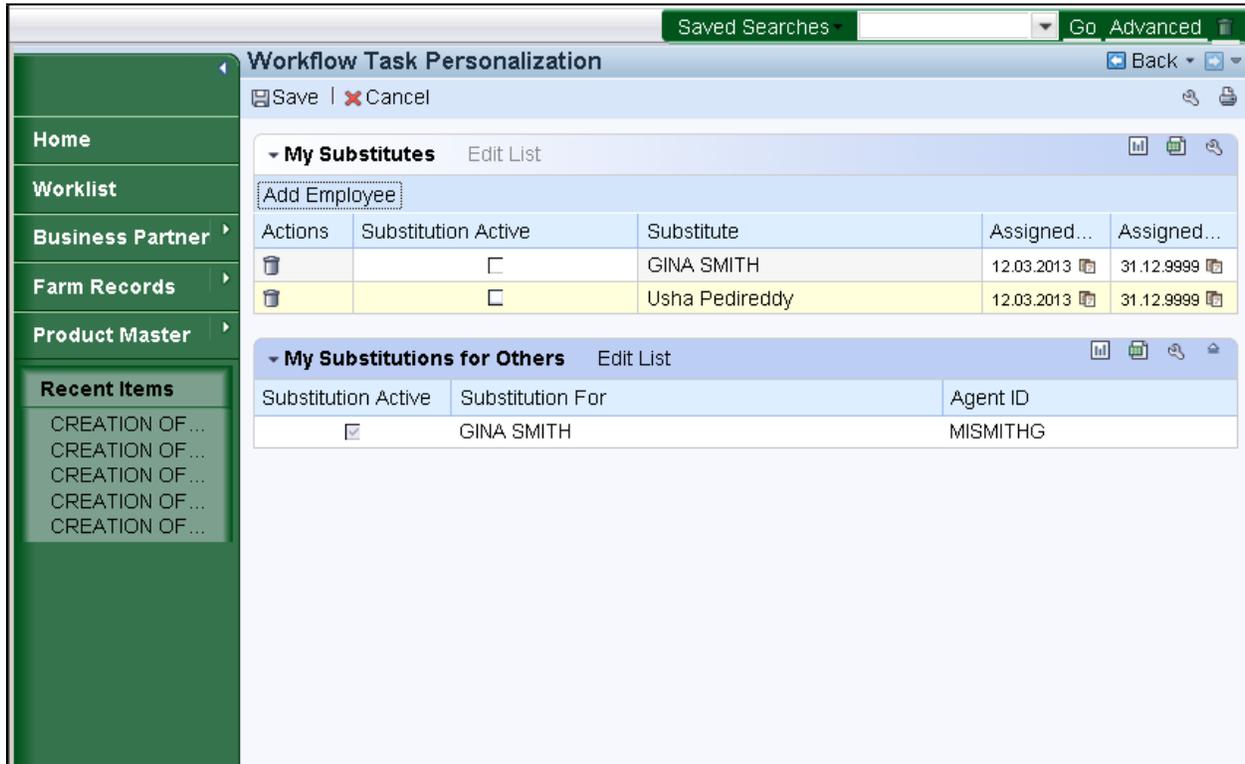
Maximum Number of Results:

Result List: 1 Employee Found

Last Name	First Name	Employee ID	Phone	E-Mail	Manager	User Name
Pedireddy	Usha	5000035			Stan Byrd	MIPEDIREDDYU

27. Click Last Name text box .

Workflow Task Personalization



Workflow Task Personalization

Save | Cancel

My Substitutes Edit List

Add Employee

Actions	Substitution Active	Substitute	Assigned...	Assigned...
	<input type="checkbox"/>	GINA SMITH	12.03.2013	31.12.9999
	<input type="checkbox"/>	Usha Pedireddy	12.03.2013	31.12.9999

My Substitutions for Others Edit List

Substitution Active	Substitution For	Agent ID
<input type="checkbox"/>	GINA SMITH	MISMITHG

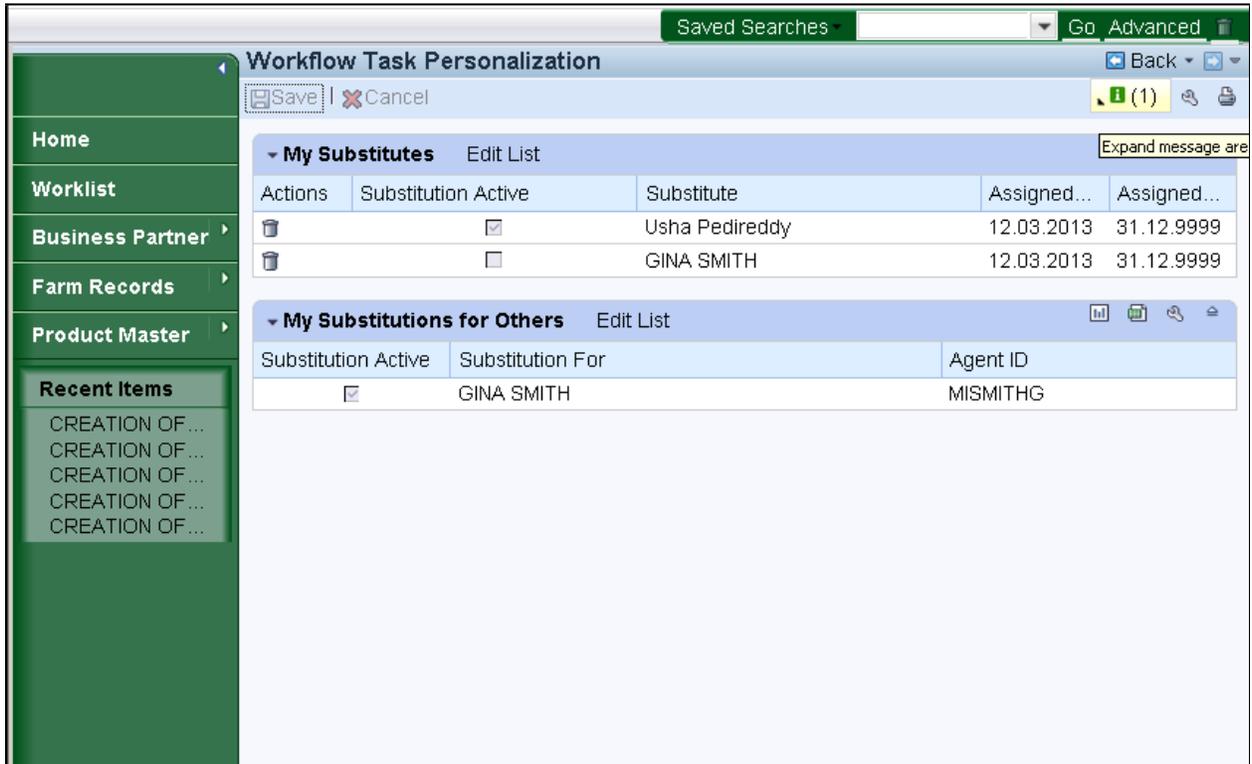
28. Click Usha Pedireddy check box to make the Substitution Active.



You do not have the option to create a Fill In Substitute in CRM. You must manage it in the Portal UWL.

29. Click Save button .

Workflow Task Personalization



Workflow Task Personalization

Save | Cancel

Expand message area

My Substitutes Edit List

Actions	Substitution Active	Substitute	Assigned...	Assigned...
	<input checked="" type="checkbox"/>	Usha Pedireddy	12.03.2013	31.12.9999
	<input type="checkbox"/>	GINA SMITH	12.03.2013	31.12.9999

My Substitutions for Others Edit List

Substitution Active	Substitution For	Agent ID
<input checked="" type="checkbox"/>	GINA SMITH	MISMITHG

30. Click Expand message area link label .

31. Click Back  button.



Result

You have created a substitute in the UWL and CRM Worklist.



Next Steps