

For: FSA Employees

MIDAS Customer Relationship Management (CRM) Training and Access

Approved by: Associate Administrator for Operations and Management

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1 Overview

A Background

In preparing for the FSA-ITSD-MIDAS Project implementation and deployment, the MIDAS Training Team developed a comprehensive training plan. For all employees who do not currently have access but require access to MIDAS CRM, the training plan consists of the following 2 components:

- web-based training
- instructor-led training.

B Purpose

This notice:

- provides National, State, and County Offices detailed information on:
 - updated guidance on the Business Partner View Only course
 - updated guidance on the course CT310 Product Master – New Product Request
 - training requirements for employees who need MIDAS CRM access
 - requesting access to MIDAS CRM upon completing training
- obsoletes notice MIDAS-34.

C Contacts

Contact 1 of the following for questions about this notice.

FOR questions about...	THEN contact...
employee data	Gina Smith by e-mail at gina.smith@mo.usda.gov .
MIDAS CRM training	Nanette (Julie) Pena by e-mail at julie.pena@ok.usda.gov .
AgLearn	Mark Nelson by e-mail at mark.nelson@kcc.usda.gov .

Disposal Date	Distribution
November 1, 2015	All FSA employees; State Offices relay to County Offices

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2 Training

A MIDAS CRM Training

Employees requiring MIDAS CRM access must complete MIDAS CRM training **before** access can be authorized. Training shall include both online training in AgLearn, and instructor-led training, as appropriate, to prepare employees for MIDAS CRM.

The AgLearn Coordinator for the employee shall assign the following MIDAS CRM web-based training courses to the employee's AgLearn account. **CLICK <http://www.aglearn.usda.gov/>** to access AgLearn. Supervisors can assist new employees with the AgLearn login process and accessing applicable courses.

The web-based courses listed in the following table in step 1 **must** be completed **before** the instructor-led training in step 2 and the State Specialist training in step 3 can be taken.

Notes: The Foundational Learning sessions have been archived and are no longer available in the MIDAS Training Community on USDA Connect. States that required these sessions for new employees shall remove the requirement.

BP301 Business Partner View has been archived. The new version currently available on AgLearn is R2BP301 Business Partner View Only. **“View”** users shall take this course and are **not** required to take R2BP320 Create Business Partner in CRM, R2BP400 Maintain Business Partner in CRM, or R2BP003 Maintain Representative Capacity.

Employees requiring:

- **“View”** access (viewer role only) in MIDAS CRM, must complete step 1
- **“Edit”** access (user role), must complete steps 1 and 2.

Note: For additional information on an employee's role and the required training, see Exhibit 1.

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2 Training (Continued)

A MIDAS CRM Training (Continued)

Step	CRM Training
1	✓
	AgLearn Courses
	R2FN100 Introduction to MIDAS Portal (previously titled FN100 Introduction to MIDAS)
	FN200 Basic Navigation of MIDAS CRM
	FN220 Managing the MIDAS Universal Worklist
	FN240 Basic Navigation of GIS in MIDAS
	R2BP301 Business Partner View Only (View users only. Not required of Edit users.)
2	CT310 Product Master – New Product Request
	<p>Note: According to obsolete notice MIDAS-13, “CT-310 Product Master-New Product Request” is required for the following:</p> <ul style="list-style-type: none"> • State and National Office employees who are responsible for compliance activity • CED’s. <p>The course is optional and can be taken on an as-needed-basis by:</p> <ul style="list-style-type: none"> • State and National Office employees who are not directly responsible for compliance activity • County Office employees other than CED’s • DD’s.
	These courses shall be completed after all MIDAS AgLearn courses in step 1 are completed.
	R2BP320 Create Business Partner in CRM
	R2BP400 Maintain Business Partner in CRM
	R2BP003 Maintain Representative Capacity
	✓
	Instructor-Led Training Courses
	CT300 Product Master
	BP302 Business Partner
FR400 Farm Records	
These assessments shall be completed after the instructor-led courses in step 2 are completed.	
✓	
Instructor-Led Training Assessments	
CT300 MIDAS Overview of Product Master (Crop Tables) Assessment	
BP302 MIDAS Create and Maintain Business Partner Assessment	
FR400 MIDAS Farm Records Assessment	
3	✓
	AgLearn Course
	R2BP500 Business Partner for State Specialists (for State Specialists only)

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2 Training (Continued)

B MIDAS CRM Access

Upon completing the training, users shall access the Information Security Office Page, Requesting Access to MIDAS, by clicking

<https://sharepoint.apps.fsa.usda.net/iso/public/Wiki%20Pages/MIDAS%20-%20Requesting%20Access.aspx>. Follow the steps provided.

Note: See Exhibit 1 for additional details on roles.

Users will then receive an e-mail stating access to the MIDAS CRM Portal has been granted. To access the MIDAS CRM Portal, enter <https://mprdep.fmmi.usda.gov> into a web browser. Provide the eAuthentication login information. Users who do not have an eAuthentication account will be able to self-register.

3 Accessing MIDAS Communities on USDA CONNECT

A MIDAS Communities Access

The MIDAS Communities on USDA Connect are resource and collaboration tools. New employees shall follow the instructions in Exhibit 2 to gain access to the MIDAS Communities on USDA Connect. The communities are as follows:

- MIDAS Community
- MIDAS Training
- SAP (MIDAS) Customer Care.

4 Action

A National Office Action

National Offices shall:

- schedule a trainer to deliver the instructor-led training as needed
- compress and streamline the 3 instructor-led training courses as appropriate
- ensure that valid data for employees is in EmpowHR, and manage Office Information Profile (OIP) assignments in Electronic Repository for Security Requests according to obsolete Notice MIDAS-16.

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4 Action (Continued)

B State Office Action

State Offices shall:

- ensure that County Offices are notified of the contents of this notice
- no longer require new employees to view the Foundational Learning sessions in the MIDAS Training Community on USDA Connect
- schedule a State Trainer to deliver the instructor-led training as needed
- compress and streamline the 3 instructor-led training courses as appropriate
- ensure that valid data for employees is in EmpowHR and manage OIP assignments in Electronic Repository for Security Requests according to obsolete Notice MIDAS-16.

C County Office Action

Supervisors are required to provide the State Office Security Liaison and the AgLearn Administrator with the names of any employees required to have MIDAS CRM access.

County Offices shall contact the appropriate DD for further assistance.

Employee Roles

The following table provides employee roles and additional information.

Role	Functions	Driven by Official SA Position	Required Training
Grantor Process Viewer	<ul style="list-style-type: none"> • Search Business Partner. • Search Farm Records. • Search Product Master. 	County Office Reviewers.	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation Of MIDAS CRM. • R2BP301 Business Partner View Only • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS.
Grantor Process User	<ul style="list-style-type: none"> • Search/Create/Edit Business Partners, Farm Records and Requested Products. • Search Products. • Create New Product Request. 	<ul style="list-style-type: none"> • Program Technicians (GS FLP & CO). • Farm Loan Officer. • Trainee. • Senior/Farm Loan Officer/Manager. 	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation Of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • BP302 Business Partner. • FR400 Farm Records.

Employee Roles (Continued)

Role	Functions	Driven by Official SA Position	Required Training
<p>Grantor Process Manager</p>	<ul style="list-style-type: none"> • Search/Create/Edit Business Partners, Farm Records. • Create new product request. • Search products. • Approve workflows. 	<ul style="list-style-type: none"> • County Office Executive Director. • County Operations Trainee. • District Director. • Senior/Lead Program Technicians. 	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • CT310 Product Master – Product Request (CED’s only) • BP302 Business Partner. • FR400 Farm Records.

Employee Roles (Continued)

Role	Functions	Driven by Official SA Position	Required Training
<p>Grantor Process Specialist – Limited</p>	<ul style="list-style-type: none"> • Can view Farm Records and create or edit Business Partner records. • Cannot complete Business Partner Merge or edit Farm Records. 	<p>State Office Specialists (non-State Security Officer (SSO) or GIS Specialist).</p>	<ul style="list-style-type: none"> • R2FN100 Introduction To MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • CT310 Product Master-Product Request (Compliance Specialists only) • BP302 Business Partner. • FR400 Farm Records. • R2BP500 Business Partner for State Specialist.

Employee Roles (Continued)

Role	Functions	Driven by Official SA Position	Required Training
<p>Grantor Process Specialist-All</p>	<ul style="list-style-type: none"> • Can perform all tasks of limited role. • Complete Business Partner Merges and edit Farm Records. 	<p>State Office Specialists (SSO or GIS Specialist).</p>	<ul style="list-style-type: none"> • R2FN100 Introduction To MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • CT310 Product Master- Product Request (Compliance Specialists only) • BP302 Business Partner. • FR400 Farm Records. • R2BP500 Business Partner for State Specialist.

Employee Roles (Continued)

Role	Functions	Driven by Official SA Position	Required Training
Grantor Process Expert- Limited	<ul style="list-style-type: none"> • Can view Farm Records and create or edit Business Partner records. • Cannot complete Business Partner Merges or edit Farm Records. 	National Office Specialists and managers.	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • CT310 Product Master-Product Request (Compliance Specialists only). • BP302 Business Partner. • FR400 Farm Records. • R2BP500 Business Partner for State Specialist.

Employee Roles (Continued)

Role	Functions	Driven by Official SA Position	Required Training
<p>Grantor Process Expert-All</p>	<ul style="list-style-type: none"> • Can perform all tasks of the Limited role. • Complete Business Partner Merges and edit Farm Records. 	<p>National Office Specialists and managers, responsible for Farm Records or Business Partner.</p>	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • CT310 Product Master-Product Request (Compliance Specialists only). • BP302 Business Partner. • FR400 Farm Records. • R2BP500 Business Partner for State Specialist.

Employee Roles (Continued)

Role	Functions	Driven by Official SA Position	Required Training
Org Structure Viewer	Search Organization Structure.	<ul style="list-style-type: none"> • National Office Specialists or Managers. 	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • BP302 Business Partner. • FR400 Farm Records. • R2BP500 Business Partner for State Specialist.

Employee Roles (Continued)

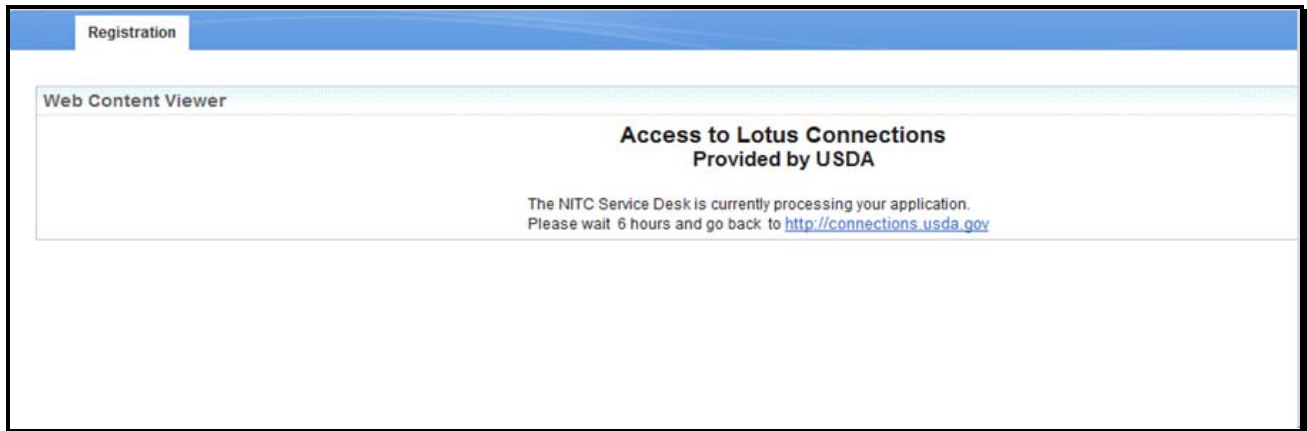
Role	Functions	Driven by Official SA Position	Required Training
Org Structure Maintainer	Search/create/edit/Organization Structure.	<ul style="list-style-type: none"> • National Office Specialists or Managers. 	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation of MIDAS CRM. • FN220 Managing the MIDAS Universal Worklist. • FN240 Basic Navigation of GIS in MIDAS. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • CT300 Product Master. • BP302 Business Partner. • FR400 Farm Records. • R2BP500 Business Partner for State Specialist.

MIDAS Communities on USDA Connect

Following are steps for accessing USDA CONNECT and membership to the MIDAS Communities.

- Users shall access USDA Connect at **connections.usda.gov**.
- Login using eAuthentication.

Note: The following screen may be displayed. If so, log back in later to complete the remaining steps. If not, proceed with the remaining steps.



- Using the search bar, search for the word "MIDAS".
- From the MIDAS Community Home Page, CLICK "Request to Join this Community".

