

Purpose

The purpose of this process is to create and manage substitutions in the CRM Worklist.

Trigger

Perform this procedure to route certain workflow tasks to a different employee.

Prerequisites

- None

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:

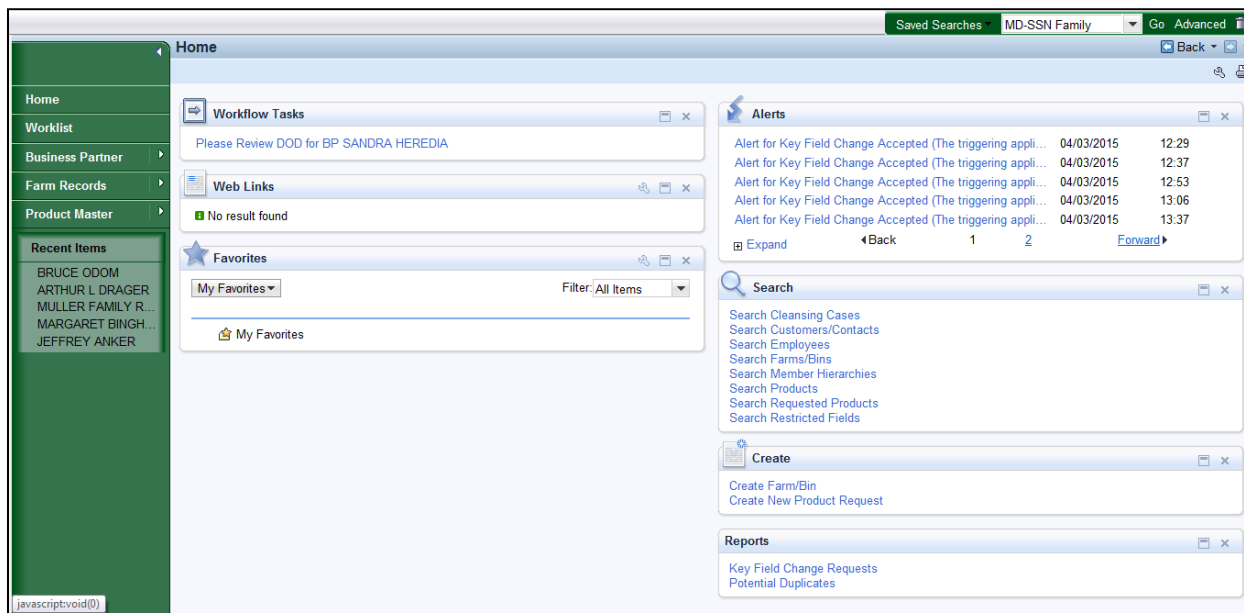
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the 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

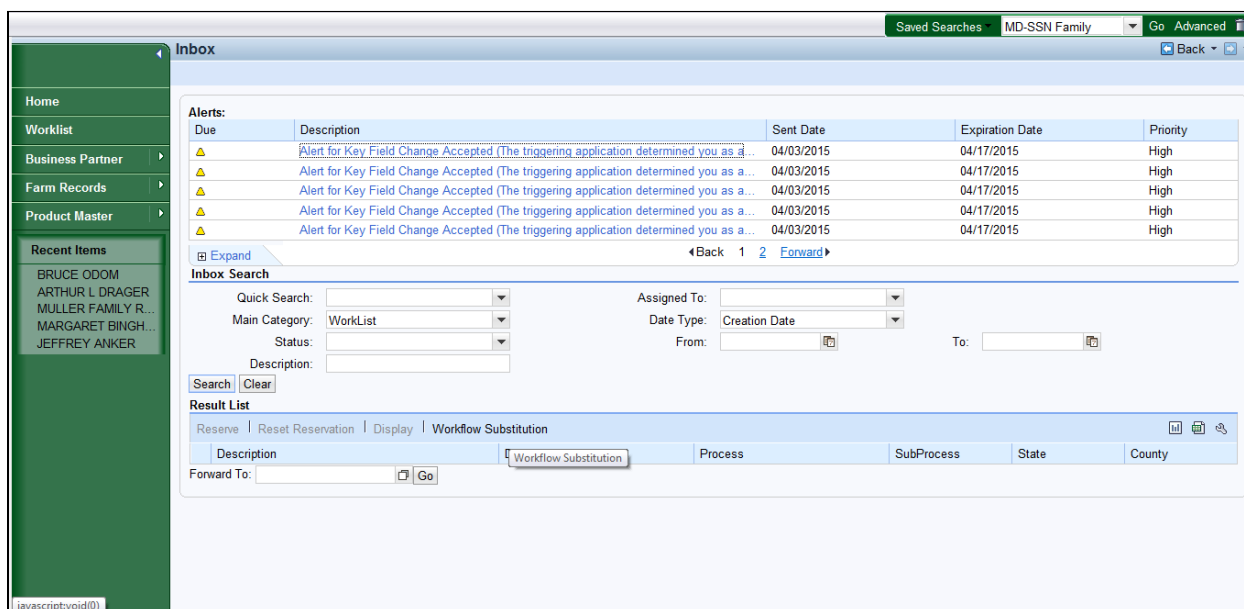
1. {Start the transaction from the MIDAS CRM Home Page.}

Home



2. Click the **Worklist** button.

Inbox

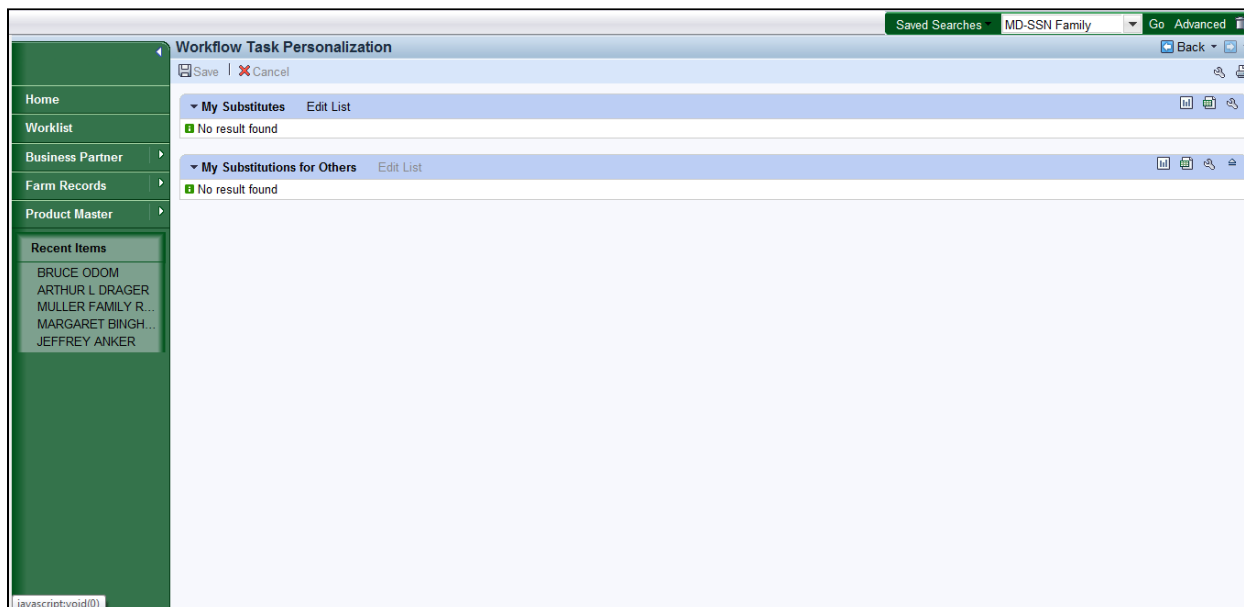


Due	Description	Sent Date	Expiration Date	Priority
04/03/2015	Alert for Key Field Change Accepted (The triggering application determined you as a...)	04/03/2015	04/17/2015	High
04/03/2015	Alert for Key Field Change Accepted (The triggering application determined you as a...)	04/03/2015	04/17/2015	High
04/03/2015	Alert for Key Field Change Accepted (The triggering application determined you as a...)	04/03/2015	04/17/2015	High
04/03/2015	Alert for Key Field Change Accepted (The triggering application determined you as a...)	04/03/2015	04/17/2015	High
04/03/2015	Alert for Key Field Change Accepted (The triggering application determined you as a...)	04/03/2015	04/17/2015	High

Description	Process	SubProcess	State	County
Workflow Substitution				

3. Click the **Workflow Substitution** button.

Workflow Task Personalization



Workflow Task Personalization

Save | Cancel

My Substitutes Edit List

No result found

My Substitutions for Others Edit List

No result found

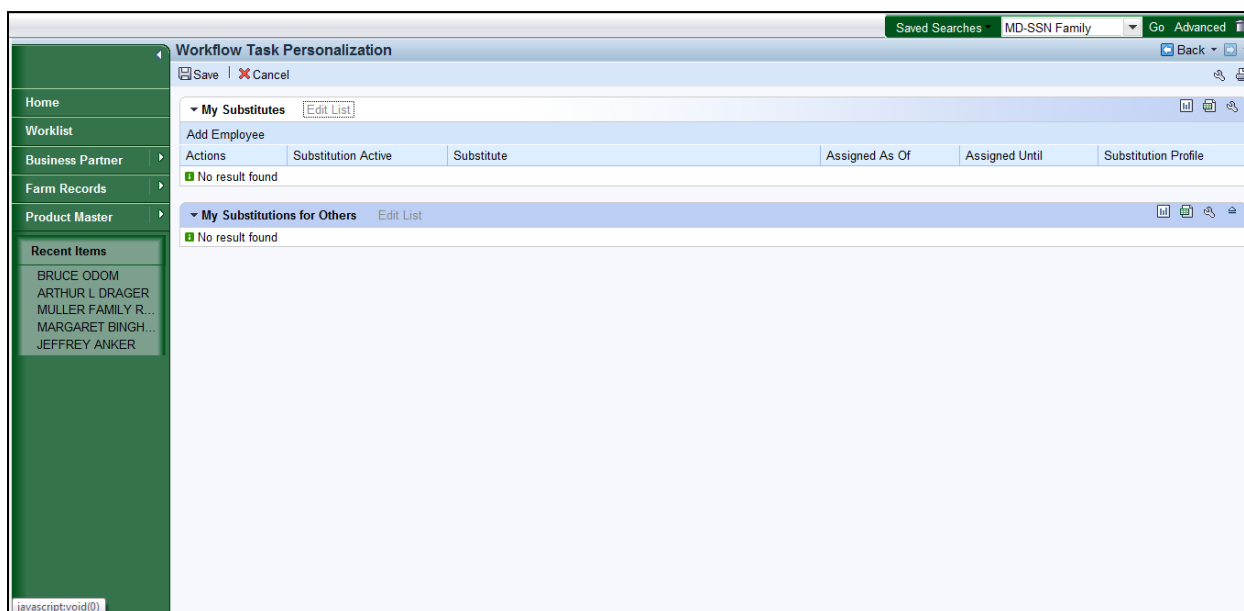
Recent Items

- BRUCE ODOM
- ARTHUR L DRAGER
- MULLER FAMILY R...
- MARGARET BINGH...
- JEFFREY ANKER

javascript:void(0)

- Click the **Edit List** button.

Workflow Task Personalization



Workflow Task Personalization

Save | Cancel

My Substitutes Edit List

Add Employee

Actions	Substitution Active	Substitute	Assigned As Of	Assigned Until	Substitution Profile
No result found					

My Substitutions for Others Edit List

No result found

Recent Items

- BRUCE ODOM
- ARTHUR L DRAGER
- MULLER FAMILY R...
- MARGARET BINGH...
- JEFFREY ANKER

javascript:void(0)

- Click the **Add Employee** button.

Search Criteria

Search Criteria

Hide Search Fields

First Name

▼

is

▼

⊕

⊖

Last Name

▼

is

▼

⊕

⊖

User

▼

is

▼

Choose the value of this criterion

Maximum Number of Results: 100

Search

Clear

Reset

Result List

First Name	Last Name	Employee ID	Phone	E-Mail	Manager	User Name
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6. As required, complete/review the following fields:

Field	R/O/C	Description
Last Name	O	The last name of an individual or a wildcard search for an individual's last name (example: a letter or fragment of a name plus *) used as part of a search criteria. Example: Org Maintainer

Search Criteria

Search Criteria

Hide Search Fields

First Name

▼

is

▼

⊕

⊖

Last Name

▼

is

▼

Org Maintainer

⊕

⊖

User

▼

is

▼

⊕

⊖

Maximum Number of Results: 100

Search

Clear

Reset

Result List

First Name	Last Name	Employee ID	Phone	E-Mail	Manager	User Name
------------	-----------	-------------	-------	--------	---------	-----------

7. Click the **Search** Search button.

Search Criteria

Search Criteria [Hide Search Fields](#)

First Name is

Last Name is Org Maintainer

User is

Maximum Number of Results:

Result List: 2 Employees Found

	First Name	Last Name	Employee ID	Phone	E-Mail	Manager	User Name
	Test ID	Org Maintainer	26012		mitst.fortmg9...		F00076
	Test ID	Org Maintainer	26037		org.mnt@test....		P2ORGMNT

8. Click the **Select table row** button next to the employee to receive workflow items.

Workflow Task Personalization

Workflow Task Personalization [Saved Searches](#) [Go](#) [Advanced](#) [Back](#) [Forward](#)

My Substitutes [Edit List](#)

Actions	Substitution Active	Substitute	Assigned As Of	Assigned Until	Substitution Profile
⊕	☒	Test ID Org Maintainer	05/05/2015	12/31/9999	All Notifications

My Substitutions for Others [Edit List](#)

Recent Items

- 81826969 Not Appli...
- 81838713 Not Appli...
- 101580669 Shekhar...
- 101580571 Battlefiel...
- 81795965 Not Appli...

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

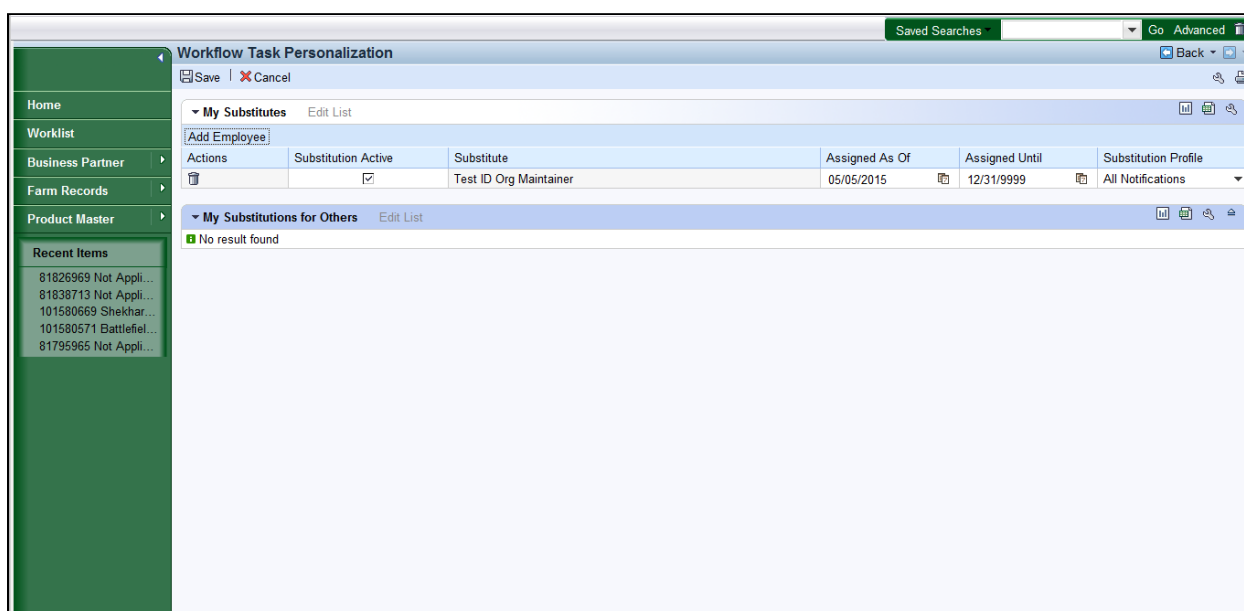
Field	R/O/C	Description
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Field	R/O/C	Description
Assigned Until	O	Date Substitute should stop receiving workflow tasks Example: 05/15/2015



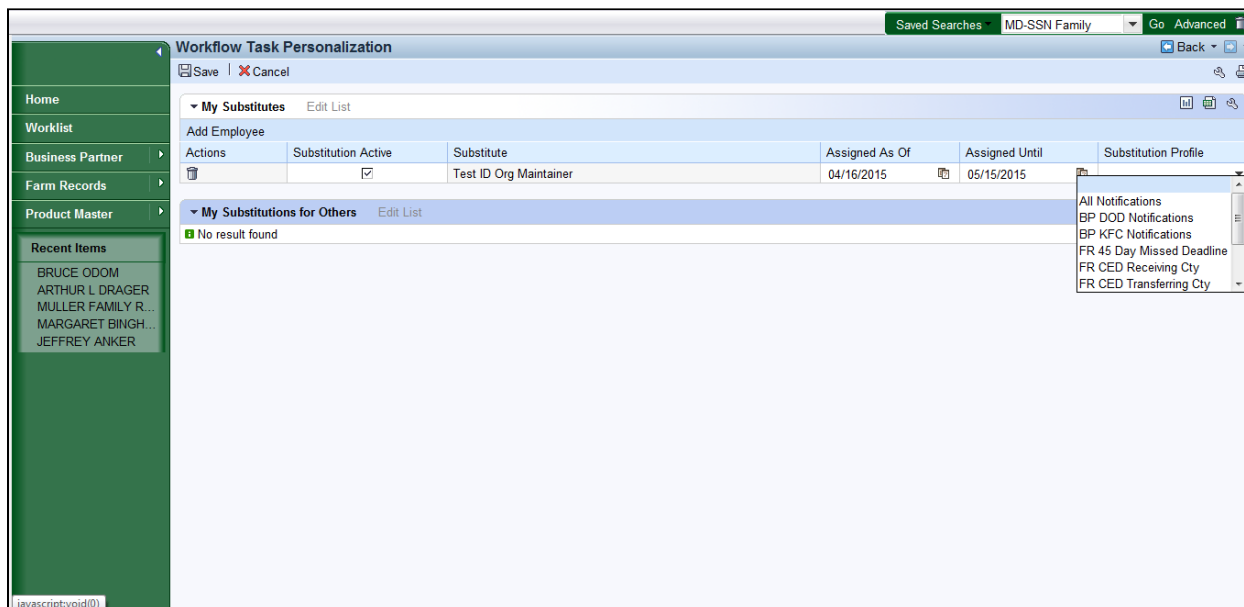
The Assigned Until date will default to 12/31/9999. This date can remain in the Assigned Until date if the substitution should be established without a known end date.

Workflow Task Personalization



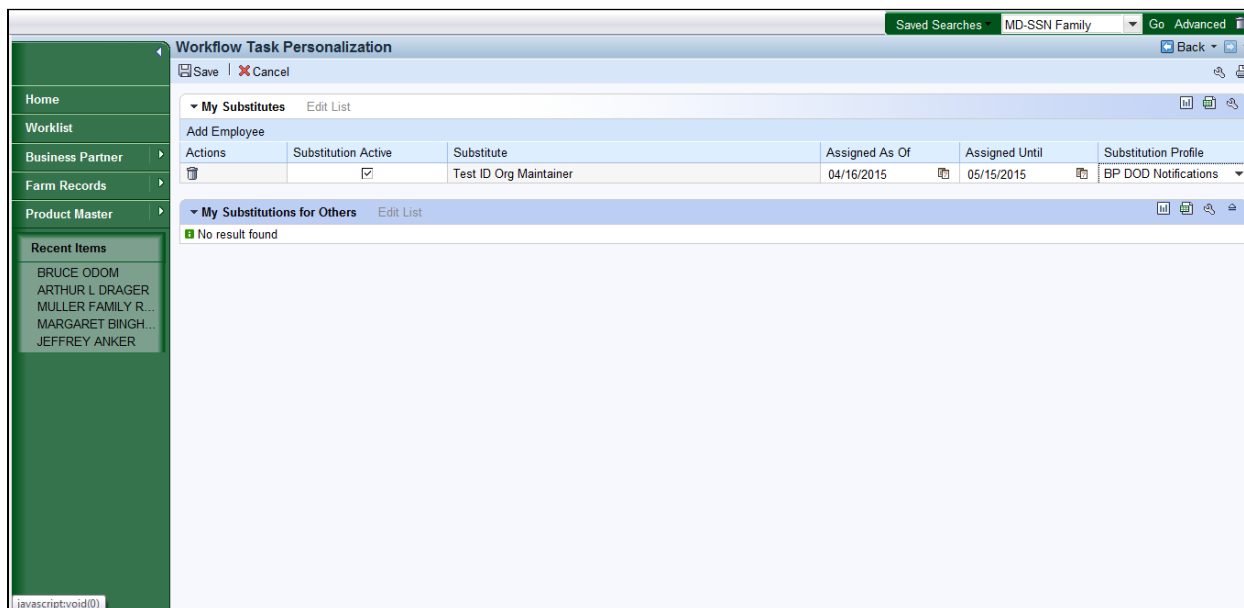
- Click the **Substitution Profile** dropdown list option button to change the type of workflow to be sent to the substitute.

Workflow Task Personalization



11. Select the workflow type from the dropdown. Note that only those types of workflow tasks will route to the substitute.

Workflow Task Personalization



12. Click the **Save** button to save the rule.



The **Delete** button in the Actions column can be utilized to remove the



substitution rule at any time.



Result

You have successfully created and managed a substitution rule in CRM.