

For: FSA Employees

MIDAS Customer Relationship Management (CRM) Training and Access

Approved by: Associate Administrator for Operations and Management



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 and 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:

- training requirements for employees who need MIDAS CRM access
- requesting access to MIDAS CRM upon completing training.

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
June 1, 2015	All FSA employees; State Offices relay to County Offices

Notice MIDAS-33

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 appropriate 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 step 1 **must** be completed **before** the instructor-led training in step 2 and the State Specialist training in step 3 can be taken.

Note: The following sessions and/or courses have been archived.

- The Foundational Learning sessions are no longer available in the MIDAS Training Community on USDA Connect. States that required these sessions for new employees should remove the requirement.
- BP301 Business Partner View is no longer available on AgLearn. A new version is being created. Until the new version is available, "**View**" users shall take the same Business Partner Courses as "**Edit**" users.

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
		R2BP320 Create Business Partner in CRM
		R2BP400 Maintain Business Partner in CRM
		R2BP003 Maintain Representative Capacity
2		These courses shall be completed after all MIDAS AgLearn courses in step 1 are completed.
	✓	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)

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> and follow the steps listed.

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 logon information. Users who do not have an eAuthentication account will be able to self-register.

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3 Access MIDAS Communities on USDA CONNECT

A MIDAS Communities Access

The MIDAS Communities on USDA Connect are resources 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.

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. • R2BP320 Create Business Partner in CRM. • R2BP400 Maintain Business Partner in CRM. • R2B003 Maintain Representative Capacity. • 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
Grantor Process Manager	<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. • 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 BP records. • Cannot complete BP Merge or edit farm records. 	<p>State Office Specialist (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. • 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 – All	<ul style="list-style-type: none"> • Can perform all tasks of limited role. • Complete BP Merges and edit farm records. 	State Office Specialist (SSO or GIS Specialist).	<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
<p>Grantor Process Expert – Limited</p>	<ul style="list-style-type: none"> • Can view farm records and create or edit BP records. • Cannot complete BP Merges or edit farm records. 	<p>National Office Specialist and managers.</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. • 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 – All	<ul style="list-style-type: none"> • Can perform all tasks of the Limited role. • Complete BP Merges and edit farm records. 	National Office Specialist and managers, responsible for farm records or BP.	<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. • 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 Specialist or 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. • R2BP500 Business Partner for State Specialist.

Employee Roles (Continued)

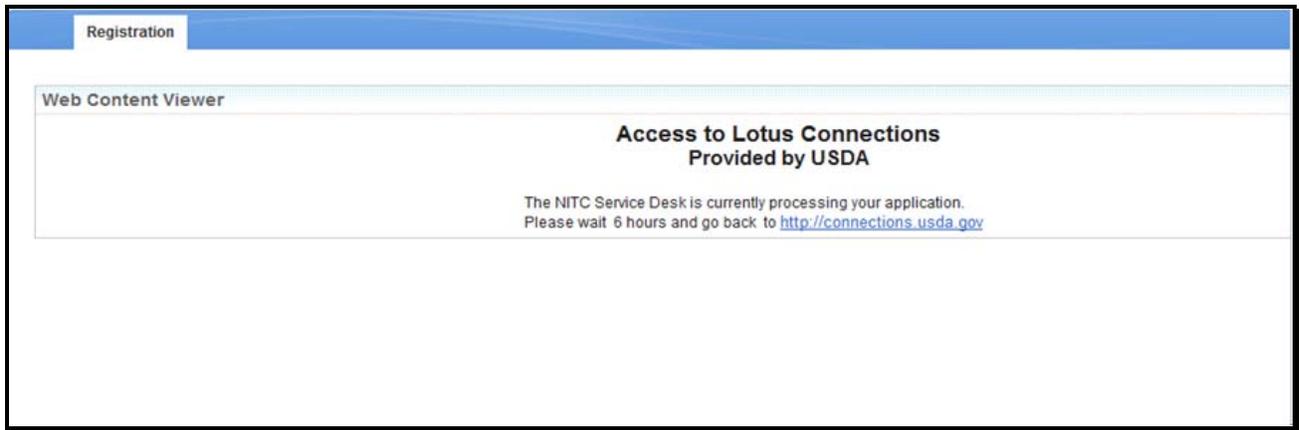
Role	Functions	Driven by Official SA Position	Required Training
Org Structure Maintainer	Search/create/edit/Organization Structure.	<ul style="list-style-type: none"> • National Office Specialist or Manager. 	<ul style="list-style-type: none"> • R2FN100 Introduction to MIDAS Portal. • FN200 Basic Navigation 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. • R2BP500 Business Partner for State Specialist.

MIDAS Communities on USDA Connect

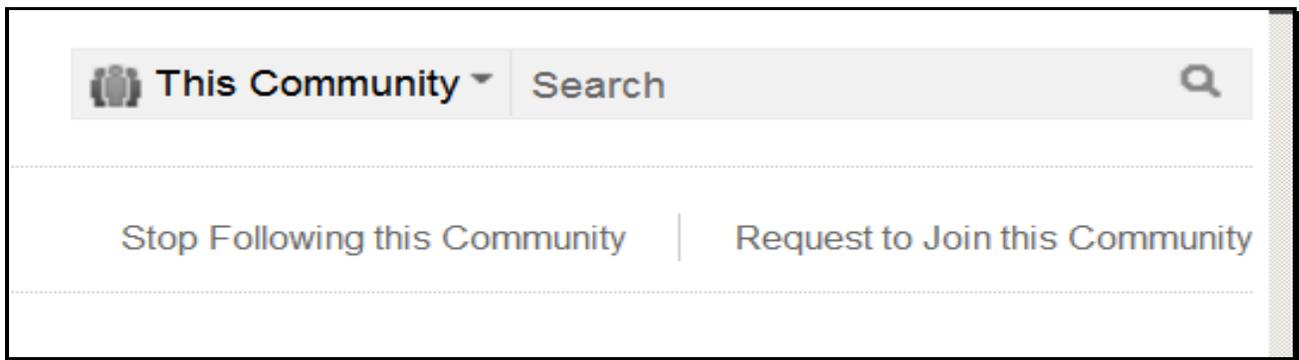
Following are steps for accessing USDA CONNECT and membership to the MIDAS Communities.

- 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".



MIDAS Communities on USDA Connect (Continued)

- When requesting to join the communities, provide details on why the request is being made.

Example: I am a new employee and require access to the MIDAS Communities.

Request Membership: FSIS Potential

All membership requests for this community require approval from a community owner.
Please tell the community owner why you would like to join this community. Click the "Send" button and your request will be sent.

Font Size

Press ALT 0 for help

Send
Cancel

- CLICK “Send”.
- USDA Connect administrators will then add the user to the MIDAS Community as well as the MIDAS Training and SAP (MIDAS) Customer Care sub-communities.