

Purpose

The purpose of this work instruction is to offer guidance on navigating a training simulation.

Trigger

Perform this procedure when having difficulty using a training simulation.

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.

<p>A reference is available</p>		<p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p>
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Procedure

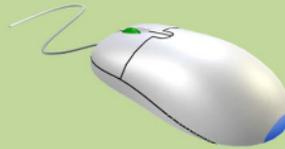
1. {Start the transaction from the exercise page of the AgLearn Course.}

Accessing Simulation from Exercise Page

Exercise 2.1: Display Customer Business Partner

Scenario:

Search for a Customer Business Partner Record Given a customer's name and address find their record in MIDAS



Click the link below to launch the interactive exercise.

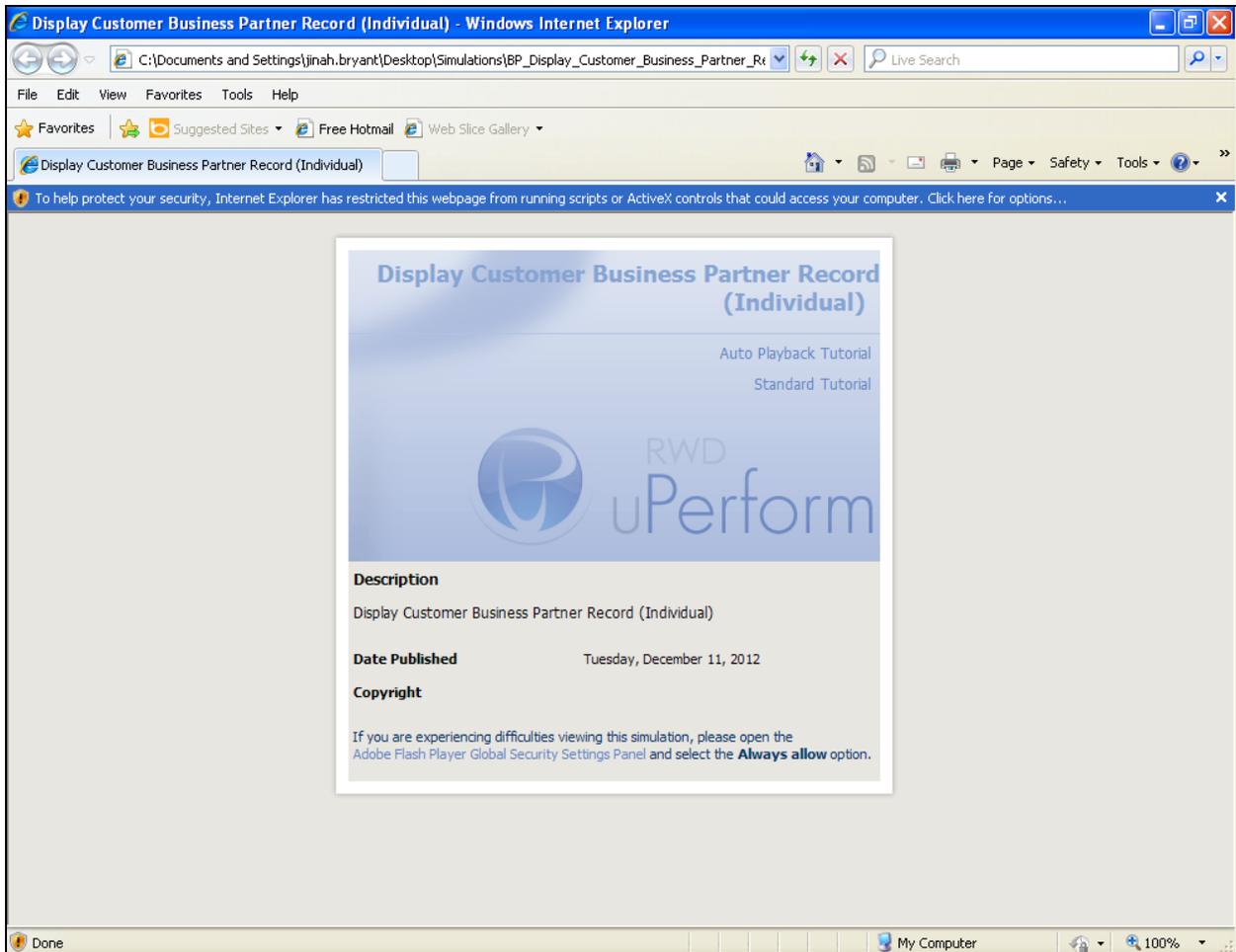
[Display Customer Business Partner Simulation](#) Note: Select Standard Tutorial

[Display Customer Business Partner PDF](#)

[Simulation Help PDF](#)

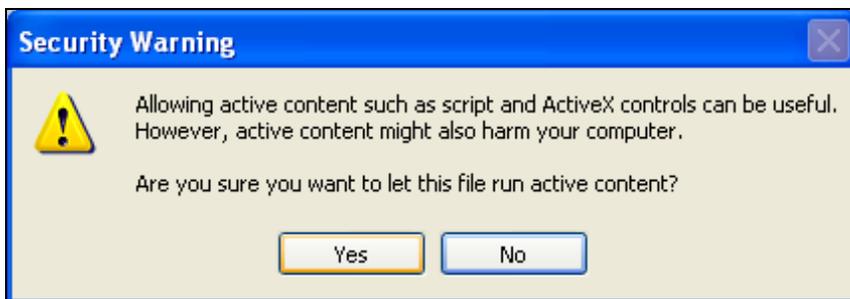
2. Click [Display Customer Business Partner Simulation](#) to launch simulation.

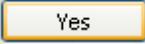
ActiveX Security Warning



3. Click the **Active X** security warning message which will appear at the top of your screen.
4. Click **Allow Blocked Content** [Allow Blocked Content...](#) from the list.

Security Warning



5. Click the **Yes** button  in the Security Warning prompt message to allow blocked content to be displayed.

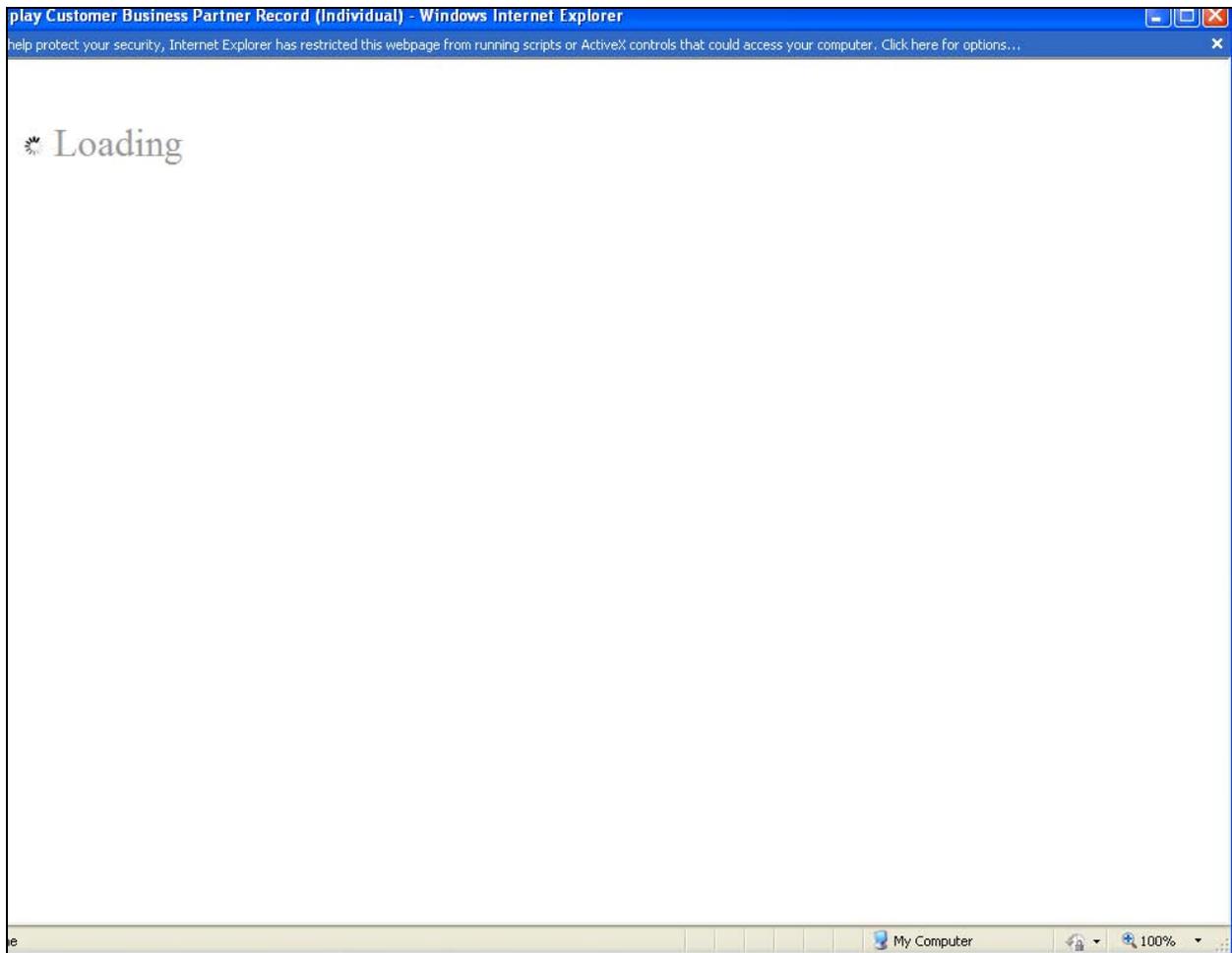
Accessing Standard Tutorial



6. Click the **Standard Tutorial** link [Standard Tutorial](#).

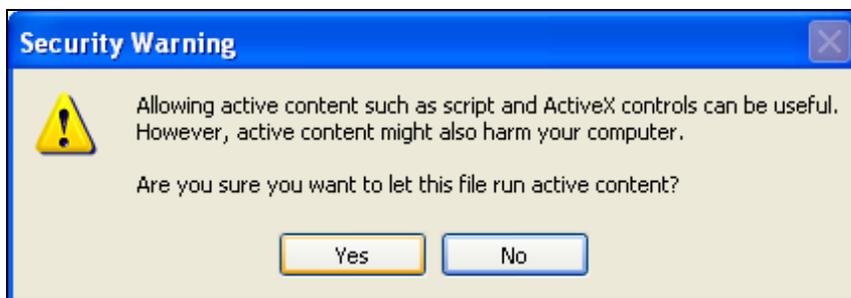
 You can select Auto Playback or Standard Tutorial. Standard Tutorial is recommended.

ActiveX Security Warning



7. Click the **Active X** security warning message which appears at the top of the screen.
8. Select **Allow Blocked Content** [Allow Blocked Content...](#) from the list.

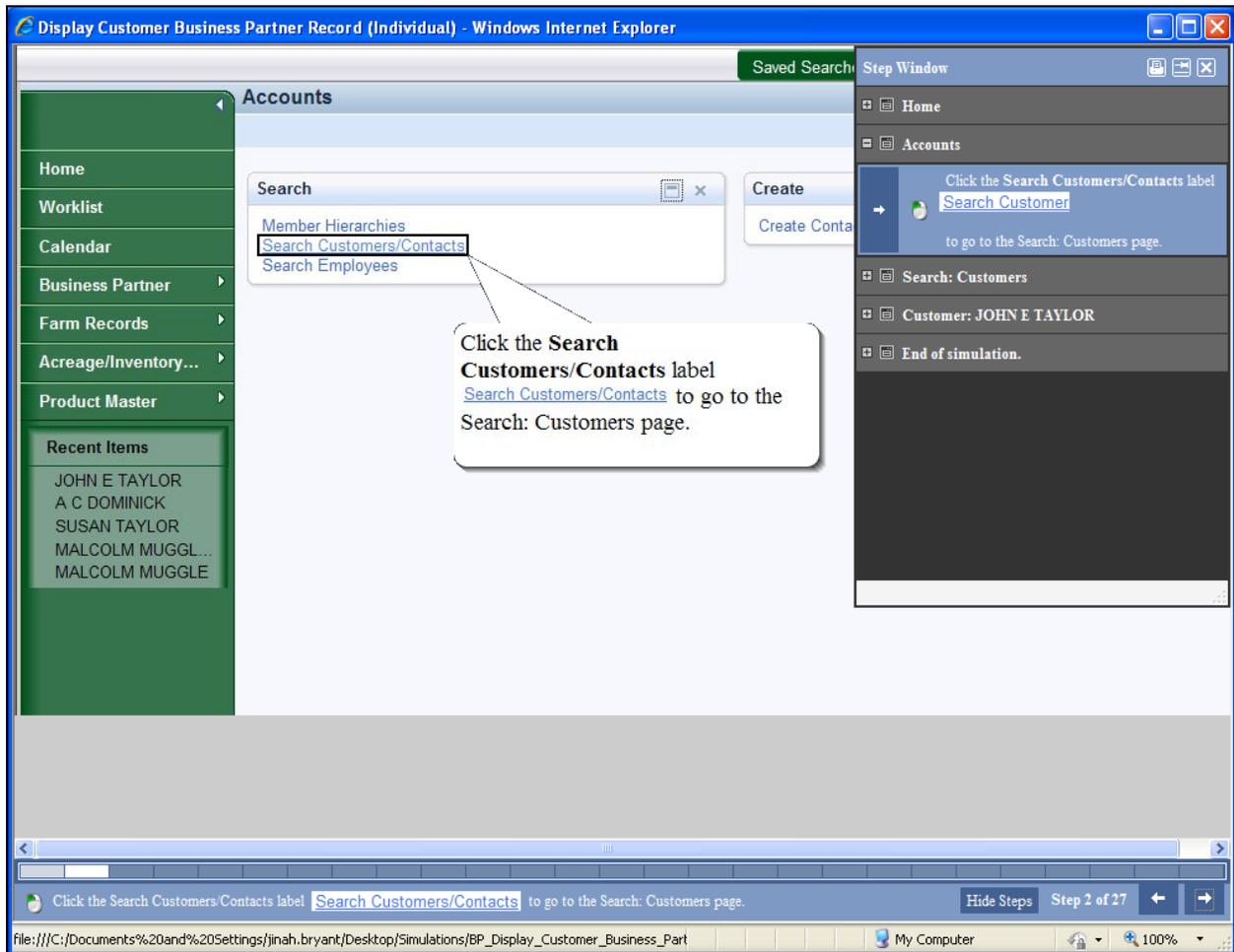
Security Warning





9. Click **Yes** button in the Security Warning prompt message to allow blocked content to be displayed.

Navigating A Simulation



10. To proceed to the next step in a simulation, perform the action described in the white callout bubble.

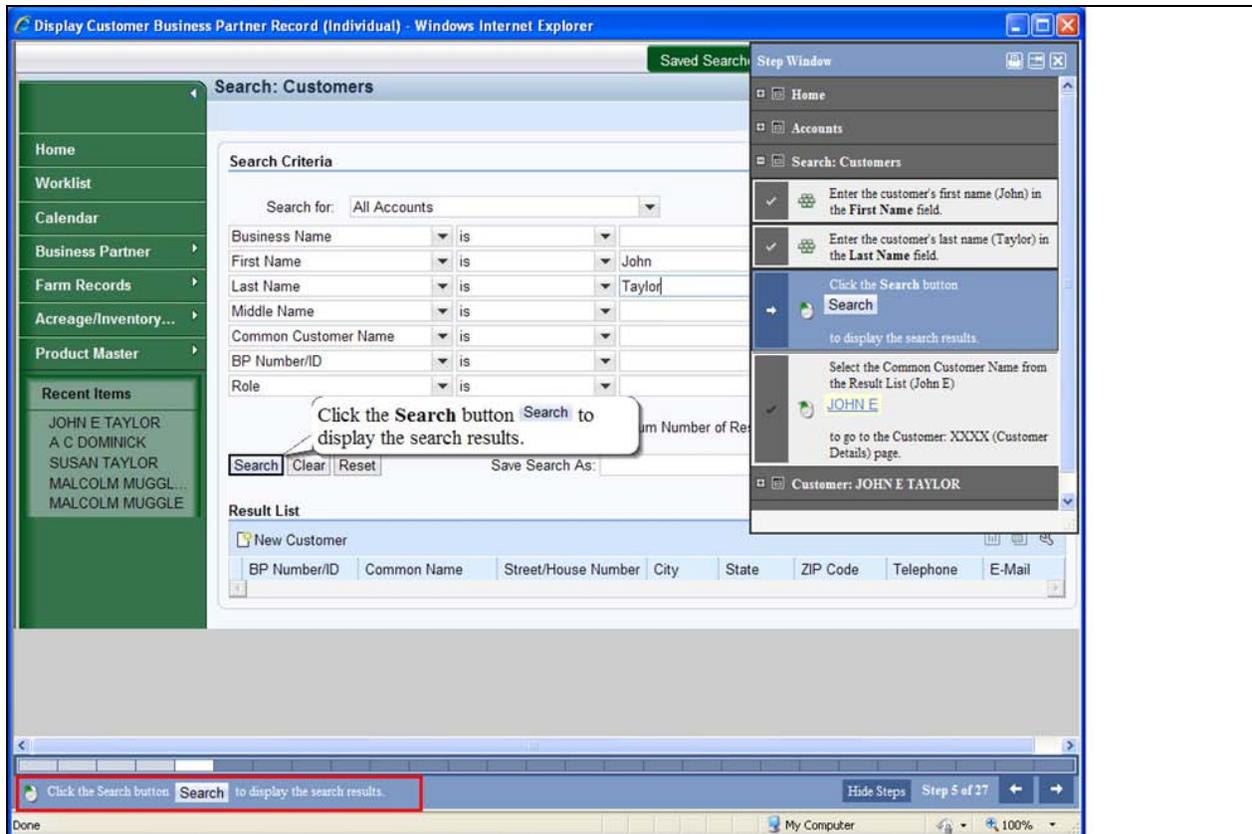


Navigating A Simulation

The screenshot displays a software interface for searching customers. On the left is a navigation menu with options like Home, Worklist, Calendar, Business Partner, Farm Records, Acreage/Inventory..., and Product Master. The main area contains a 'Search Criteria' form with fields for Business Name, First Name, Last Name, Middle Name, Common Customer Name, BP Number/ID, and Role, each with a dropdown menu. A callout box points to the 'Last Name' field with the text 'Enter the customer name (Taylor) in Name field.' Below the form are 'Search', 'Clear', and 'Reset' buttons, and a 'Save Search As:' field. To the right is a 'Search: Customers' panel with instructions: 'Enter the customer's first name (John) the First Name field.', 'Enter the customer's last name (Taylor) the Last Name field.', 'Click the Search button Search to display the search results.', and 'Select the Common Customer Name from the Result List (John E) JOHN E to go to the Customer: XXXX (Customer Details) page.' Below this is a 'Customer: JOHN E TAYLOR' section. At the bottom, a 'Result List' table has columns for BP Number/ID, Common Name, Street/House Number, City, State, ZIP Code, Telephone, and E-Mail. A step bar at the bottom left shows 'Step 5 of 27' and a red box highlights a button. The status bar at the bottom indicates 'Done', 'My Computer', and '100%'.

11. There are multiple ways to navigate through the simulation. Click the box  in the step bar at the bottom left of the screen to move forward, backward and proceed to a specific step.

Navigating A Simulation



12. Click the button  in the **Step Window** pane to navigate to the next step in the process.



Click the toggle button to expand the steps in the Step Window



The dialog box at the bottom of the screen will display the action you are to perform on the current step.



Navigating A Simulation

Display Customer Business Partner Record (Individual) - Windows Internet Explorer

Search: Customers

Search Criteria

Search for: All Accounts

Business Name is
 First Name is JOHN
 Last Name is TAYLOR
 Middle Name is
 Common Customer Name is
 RP Number/ID is

Maximum Number of Results:

Save Search As:

Result List

BP Number/ID	Common Name	Street/House Number	City	State	ZIP Code	Telephone	E-Mail
8000001960	JOHN E	5678 E CHURCH ST	FREDERICK	Maryland	21701	+1 (7013419976)	JTaylor@...

Step Window

- Home
- Accounts
- Search: Customers
 - Enter the customer's first name (John) in the First Name field.
 - Enter the customer's last name (Taylor) in the Last Name field.
 - Click the Search button Search to display the search results.
 - Select the Common Customer Name from the Result List (John E) JOHN E to go to the Customer: XXXXX (Customer Details) page.
- Customer: JOHN E TAYLOR

Hide Steps Step 6 of 27

Select the Common Customer Name from the Result List (John E) JOHN E to go to the Customer: XXXXX (Customer Details) page.

13. Click the **Hide Steps** link [Hide Steps](#) to close the Step Window pane.



The current step displayed will be highlighted in blue in the Step Window navigation pane.



Navigating A Simulation

Display Customer Business Partner Record (Individual) - Windows Internet Explorer

Search: Customers

Search Criteria

Search for: All Accounts

Business Name is [] [X] [X]
 First Name is [] JOHN [X] [X]
 Last Name is [] TAYLOR [X] [X]
 Middle Name is [] [X] [X]
 Common Customer Name is [] [X] [X]
 RP Number/ID is [] [X] [X]
 [] is [] [X] [X]

Maximum Number of Results: 100

Save Search As: [] Save

Result List

BP Number/ID	Common Name	Street/House Number	City	State	ZIP Code	Telephone	E-Mail
8000001960	JOHN E	5678 E CHURCH ST	FREDERICK	Maryland	21701	+1 (7013419976)	JTaylor@

Select the Common Customer Name from the Result List (John E) [JOHN E](#) to go to the Customer: XXXX (Customer Details) page.

Restore Steps Step 6 of 27

Select the Common Customer Name from the Result List (John E) [JOHN E](#) to go to the Customer: XXXX (Customer Details) page.

file:///C:/Documents%20and%20Settings/jinah.bryant/Desktop/Simulations/BP_Display_Customer_Business_Part My Computer 100%

14. Click the **Restore Steps** link [Restore Steps](#) to toggle the Step Window pane.



Navigating A Simulation

The screenshot shows the 'Display Customer Business Partner Record (Individual)' page in Internet Explorer. The search criteria are set to 'All Accounts' with filters for 'First Name' (JOHN) and 'Last Name' (TAYLOR). The search results table is as follows:

BP Number/ID	Common Name	Street/House Number	City	State	ZIP Code	Telephone	E-Mail
8000001960	JOHN E	5678 E CHURCH ST	FREDERICK	Maryland	21701	+1 (7013419976)	JTaylor@f

The 'Step Window' on the right indicates the current step: 'Click the Search Customers/Contacts label Search Customer to go to the Search: Customers page.' A yellow callout bubble points to the 'JOHN E' link in the search results, with the text: 'Select the Common Customer Name from the Result List (John E) JOHN E to go to the Customer: XXXXX (Customer Details) page.'

15. Click the **Navigate Forward** button to proceed to the next step.

Whenever a note appears on a screen, it is best to read the note details before performing step action.

Notes always appear in yellow callout bubbles.



Navigating A Simulation

Customer Profile - contains gender, birth date, marital status, ethnicity information as well as Date of Death.

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender: Male | Gender Determination: [checked]

Birth Date: 12.05.1980 | Birth Date Determination: [checked]

Marital Status: Unknown N/A | Marital Status Determination: [checked]

Citizen Country: USA | Citizenship Determination: [checked]

Ethnicity: Not Hispanic or Latino | Ethnicity Determination: [checked]

Resident Alien: Not Applicable | Resident Alien Determination: [checked]

Date of Death: [] | Date of Death Determination: [checked]

Mail Indicators

RMA Mail Indicator: | NRCS Mail Indicator:

RD Mail Indicator: | FSA Mail Indicator:

Race

Ac...	Race	Race Determination
[trash icon]	White - Origins in original peoples of Europe, the Midd...	Self Declared(Customer)

Step Window

- Home
- Accounts
- Search: Customers
- Customer: JOHN E TAYLOR
- Click the **Customer Profile** tab to go to the Customer: XXXXX (Customer Profile) page.
- Scroll down to see the remain information.
- Scroll to the top of the page.
- Click the **Roles** tab to go to the Customer: XXXXX (Roles) page.
- Click the **Identification Numbers** tab

Scroll down to see the remain information. Hide Steps Step 8 of 27

- Click the buttons in the upper right corner of the Step Window pane to print the steps in the simulation, pin down the Step Window pane or exit the pane.



Result

You have completed navigation of a simulation.

