

Module 1: Summary of CaseWorks Workflow and Role Groups

- Review of Recent Enhancements

Module 2: Navigating CaseWorks

- Home Page
- Menu Page
- Proceedings Tab
- Data Request Tab
- Calendar Tab
- Documents Tab

Morning Break

Module 3: Workflow and Responsibilities by Role

- Case Coordinators
- Point Persons
- Drafters
- Department Reviewers
- Final Reviewers

Module 4: Proceedings and Work Flow

- Document Storage
 - Procedural Schedules
 - Filings by Company and Other Parties
 - Commission Orders
- Testimonies
- Email Notifications and Workflow
- Security

Lunch Break

Module 5: Data Request Work Flow for all Role Groups

- Adding and Assigning Data Requests
- Drafting and Reviewing Data Request Responses
- Data Requests and Confidential Responses
- Email Notifications and Workflow
- CaseWorks Security
- Processing and Submitting Data Requests Responses

Afternoon Break

Module 6: Problem Handling

- Error Validation
 - Document steps that led to the error
 - Verify the problem can be recreated
 - Contact Internal Technologies to determine if it is an MS Office or People Soft issue
 - Contact Flexnova/CES if it's determined to be a problem with CaseWorks
- Tracking Problems
- Trouble Shooting Guide

Open Discussion

Standard Training

Day 2 – Case Coordinators

Module 1: Detailed Look at enhancements in CaseWorks2010

- Document Manager
- Search Feature
- Case Area and Type

Module 2: Setup

- Adding an Area
- Adding a Case

Module 3: Handling Data Requests

- Uploading
- Naming Convention
 - Set Numbers
 - Item Numbers
- Confidential / Read Only
- Assigning
- Preparing for Submission (Reaggregation)
- Submitting Responses to Requestors

Morning Break

Module 4: Proceedings

- Adding Procedures
- Storing Documents
- Drafting Testimony
- Securing Final Testimonies

Module 5: Reports

- Creating and Modifying Reports
- Running Reports

Lunch Break

Module 6: Setting up Role Groups and Security

- Naming conventions
- How to NOT break a role group
- Error handling (fixing or recreating a role group)
- Who should have security to add/remove users

Module 7: Problem Handling Review

- Reporting Problems
 - Error Validation
 - Document steps that led to the error
 - Verify the problem can be recreated
 - Contact Internal Technologies to determine if it is an MS Office or People Soft issue
 - Contact Flexnova/CES if it's determined to be a problem with CaseWorks
- Tracking Problems
- Trouble Shooting Guide

Open Discussion