



**SPECIALIZED ENERGY  
CONSULTANTS, INC.**

## **Segmented Training For Point Persons (4 hours)**

### **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

### **Module 3: Workflow and Responsibilities**

### **Module 4: Proceedings and Work Flow**

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

### **Break**

### **Module 5: Data Request Handling**

- Email Notifications and Workflow
- Assigning Data Requests to Drafter(s)
- Reviewing Data Request Responses
- Assigning Data Requests to Department Reviewer(s)
- How to handle Confidential Responses
- CaseWorks Security
- Processing and Submitting Data Requests Responses

### **Module 6: Problem Handling**

- 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**