

Case Coordinator Training Day1

Module 1: Summary of CaseWorks Workflow and Role Groups

- Enhancements in CaseWorks 2010

Module 2: Roles and Responsibilities Overview

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

Module 3: Navigating CaseWorks

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

Morning Break

Module 4: Setup

- Adding an Area
- Adding a Case

Module 5: Proceedings and Work Flow

- Document Storage
 - Procedural Schedules, adding and modifying
 - Filings, Company and Other Parties
 - Commission Orders
- Testimonies
- Assigning
- Email Notifications and Workflow
- Security

Lunch Break

Module 6: Handling Data Requests

- Uploading Data Request
 - Set Numbers
 - Item (DR) Numbers
 - Confidentiality (Question, Drafting Response, Submission)
 - Assigning
 - Email Notification and Workflow

Afternoon Break

Module 7: Continued

- Preparing for Submission
 - Question vs. Response Document
 - Preparing for Submission
 - Reaggregation
 - Submitting to Requestors

Case Coordinator Training Day 2

Module 8: 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

Morning Break

Module 9: Managing Valid Values

- Adding new values
- Renaming values
- Proceedings Tab
- Data Request Tab
- Calendar Tab
- Documents Tab

Lunch Break

Module 10: Reports

- Creating new Reports
- Running Reports
- Modifying Existing Reports

Module 11: Review Guides

- User Guide
- Case Coordinator Guide

Afternoon Break

Module 12: 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 a problem with Microsoft Office or People Soft
- Contact Flexnova/CES if it's determined to be a problem with CaseWorks.
- Tracking Problems
- Trouble Shooting Guide

Open Discussion