

**iGOVERN™ Complaint and Quality Management System**

**Deliverable Name: Public User Training Manual**

**Date- May 21, 2012**

# Introduction

## Overview

Case Management System (CMS) enables the Public Users to search the CQM Application, view case related public information, tariffs, annual reports, deliberations, submit comments in a case and submit complaints to the Consumer Assistance Division.

## Purpose

The purpose of this document is to provide general information and instruction to public users regarding use of the Commission’s CMS system.

## Conventions

Following table presents list of icons and its purpose that are used throughout the application for performing various actions.

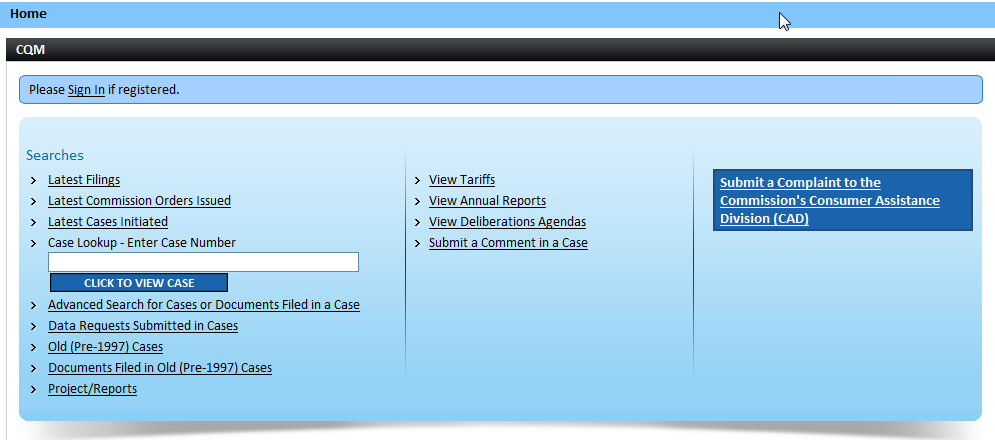
| **ICON** | **Name** | **Convention** |
| --- | --- | --- |
| untitled | Button | Click on a button to perform an action. The button text describes the action that will occur upon clicking the button.  Submit button enables the user to submit information, which is stored in a repository. |
| untitled | Button | User can select this button to attach documents. On clicking this button, a new window will be opened for the user to browse and attach the document. |
| untitled | Button | User can select this button to reload page. All data previously captured on the page and not saved by user is cleared from all fields. |
| untitled | Button | User can select this button to go back to the previous page.  Note**:** Do not use the back button on your browser window. If you want to go back to the previous screen, use the Back button in the application itself. |
| untitled | Button | User can select this button to search for any information. |
| untitled | Button | User can select this button to clear all the information entered by the user for extraction of information from the application. |
| untitled | Button | After entering specific criteria (e.g., Case Number) upon clicking on this button, user will be navigated as per entered criteria (e.g., Case File). |
| untitled | Button | User can select this button to delete information. |
| untitled | Check Box / Checklist | Users can select one or more items from a list by checking the checkboxes. |
| untitled | Drop Down List Box | Control that displays a current setting, but can be opened to display a list of choices. |
| Add | Link | Click/select hyperlink to invoke a new page or a process. The text of the hyperlink will describe the action that will be invoked, e.g., Add, Remove etc. |
| untitled | Page Size | User will be able to change screen to display a specific number of rows by entering a number up to 100 in the text box. |
| untitled | Paging | Select number from list box to navigate to the page number chosen. |
| untitled | Paging Links | Click on hyperlinks to navigate to First, Last, Next or Last page of information being displayed. |
| untitled | Calendar | Click on icon to view the calendar look-up and select a date. |
| RadioChecked | Radio Button | Select one of the radio buttons in a group to designate the desired option, e.g., view Notification List or Active Party List, Check-In/Out selected Document, etc. |
| untitled | Text Box | The purpose of text box is to allow the user to input text information to be used by the program. Enter data in a defined area on the page by typing in the text box. |
|  | Help | Click on the icon to display online help document in a pop-up window. |
|  | About | Click on the icon to display information about the application |
|  | Home | Click on the icon to navigate to the Home Page |
|  | Logout | Click on the icon to logout of the application |
| untitled | Mandatory Fields | All the mandatory (required) entry fields are prefixed with a red asterisk. |
| untitled | Software Designator | Microsoft Excel Software |
| untitled | Software Designator | Microsoft Word Software and Rich Text Format (RTF) |
| untitled | Software Designator | Adobe Portable Document Format (PDF) |
| untitled | Security Icon | Image to designate a confidential document |
| untitled | Error | Error in the application. |
| untitled | Info | Displays information. |
|  | Expand | By clicking on plus (+) sign to the left of a Section Title, contents of the section will be expanded for viewing additional details. |
|  | Collapse | *To* collapse *details displayed in a section, click on minus (-) sign to hide the contents of the section.* |

## Acronyms

|  |  |
| --- | --- |
| Abbreviations/ Acronym | Description |
| CQM | Complaint and Quality Management |
| CMS | Case Management System |

# System Features

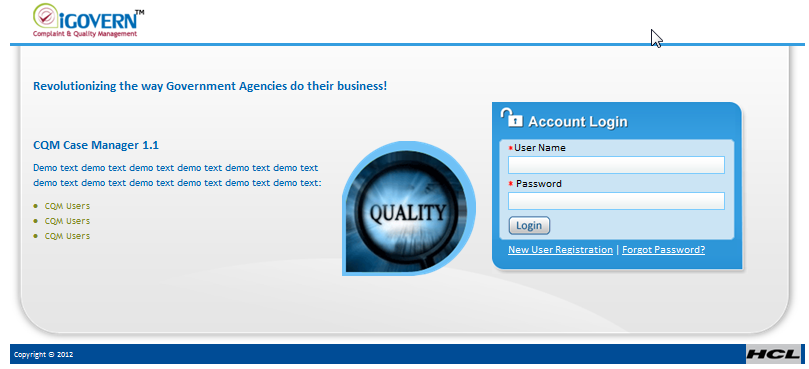
## Home Page Layout – Public User (Not Registered)



Public User Home Page

The **Public User Home Page** in CQM displays the following information:

* To Register and/or Sign In, click on the **Please Sign in or Register as New User hyperlink.** When clicked user will be navigated to **Login Screen.**



Login Page

* **Common Buttons** are displayed under the Application Header.

|  |  |  |
| --- | --- | --- |
| **Icon** | **Icon Name** | **Description** |
|  | Help | Click on the icon to display online help document in a pop-up window. |
|  | About | Click on the icon to display information about the application. |
|  | Home | Click on the icon to navigate to the Home Page. |
|  | Logout | Click on the icon to logout of the application. |

## 

Public User Home Page

## Public User Functionality (Not Registered)

**Application Level Access Menu** lists links to the various modules in the application for which Public User has Access Rights. By clicking on a Search hyperlink, user will be navigated to the corresponding module.

🗹 **Searches:**

* **Latest Filings –** will display in a pop-up window, the filings submitted within the last 30 days. The filings will not include any Confidential or Secured Case filings.

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Latest Filings** **hyperlink**   * When clicked, the Latest **Filings** pop-up window will display filings submitted within the last 30 days. |
|  | * Click on the **Case No. hyperlink** to be navigated to the Case File for the selected case      * Click on **Document Title hyperlink** to view filing |
|  | * Click on **Filing No. hyperlink** to view pop-up window containing filing information will be displayed * In Attachments section, click on **Document Title hyperlink** to view filing. |

* **Latest Commission Orders Issued:**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Latest Commission Orders Issued hyperlink**   * When clicked, **the Latest Commission Orders Issued** pop-up window will display in descending Issued Date order, the Commission issuances for the last 30 days. |
|  | * Click on the **Case No. hyperlink** to be navigated to the Case File for the selected case      * Click on **Document Title hyperlink** to view Issuance |
|  | * Click on **Filing No. hyperlink** to view pop-up window containing filing information will be displayed * In Attachments section, click on **Document Title hyperlink** to view issuance |

* **Latest Cases Initiated:**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Latest Cases Initiated** **hyperlink**   * When clicked, the **Latest Cases Initiated** pop-up window will display filings submitted within the last 30 days. |
|  | Click on the **Case No. hyperlink** to be navigated to the Case File for the selected case |

* **Case Lookup:**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, enter **Case Number in text box** and **CLICK TO VIEW CASE BUTTON** |
|  | The **Case File Screen** will be displayed |

* **Advanced Search for Cases or Documents Filed in a Case:**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Advanced Search for Cases or Documents Filed in a Case** **hyperlink**   * When clicked, the **Search Screen** will be displayed * User can search by **Case** or **Document**. For this exercise, select **Document Radio Button** * Enter known search criteria. For example, enter **Case Number** in text box and select from **Document Type** drop down listand click on **Search Button** |
|  | Displayed **Search Result** will match the entered search criteria. If no results are found in the application, “No Records Found” should be displayed. |

* **Data Requests Submitted in Cases**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Data Requests Submitted in Cases** **hyperlink**   * When clicked, the **Data Request Search Screen** will be displayed * User can search by **Case** or **Document**. For this exercise, select **Document Radio Button** * Enter known search criteriaand click on **Search Button** |
|  | Results matching the entered search criteria will be displayed in the results grid. If no results are found in the application, “No Records Found” will be displayed   * User can select **Radio Button** and click on either **Print Result** to print displayed screen or **Print Q&R Pair** to print the question and response set * User can click on **View hyperlink** to display Questions and/or Reponses |

* **Old (Pre-1997) Cases**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Old (Pre-1997) Cases** **hyperlink**   * When clicked, the **Search Screen** will be displayed * Enter known search criteria and click on **Search Button** |
|  | Results matching the entered search criteria will be displayed in the results grid. If no results are found in the application, “No Records Found” should be displayed. |
|  | * Click on **Case No. hyperlink** to view case details |

* **Documents Filed in Old (Pre-1997 Cases)**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Documents Filed in Old (Pre-1997) Cases** **hyperlink**   * When clicked, the **Search Screen** will be displayed * Enter known search criteria and click on **Search Button** (For this exercise, enter Case Number obtained from previous case search) |
|  | Results matching the entered search criteria will be displayed in the results grid. If no results are found in the application, “No Records Found” should be displayed.   * Click on **Case Number hyperlink** to view Case File * Click on Document Title hyperlink to view filed document |

* **Projects/Reports**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Projects/Reports** **hyperlink**   * When clicked, the **Search Screen** will be displayed * Enter known search criteria (For this exercise select **Project/Report Type from the drop down list** for the **Report/Project Year 2012**) and click on **Search Button** |
|  | Results matching the entered search criteria will be displayed in the results grid. If no results are found in the application, “No Records Found” should be displayed.   * Click on **Tracking Number hyperlink** to view Case File |
|  | Top sections of the pop-up window will display Report/Project details.   * In the **Attached Document Detail Section** click on the **Filename** **hyperlink** to view the document that was attached to the Report/Project Submission |

* **View Tariffs:**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **View Tariffs** **hyperlink**   * When clicked, the **View Tariff Screen** will be displayed * The **Utility Radio Button** will be selected by default; to search by **Rate/Section** select associated **Radio button** * Enter known search criteria. At a minimum, user is required to select **Pertaining to Utility from the drop down list** when searching by **Utility** or **Rate/Section Name/Number** when searching by **Rate/Section**. |
|  | * After entering search criteria, click on **View Button**   Tariff matching entered search criteria should be displayed in the grid posted at the bottom of the screen.   * To View Tariff, click on **Rate/Section Name/Number hyperlink**      * Tariff will be displayed in pop-up window |

* **View Annual Reports:**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **View Annual Reports** **hyperlink**   * When clicked, the **Search Screen** will be displayed * Enter known search criteria. For this exercise, enter in the **Report for Year text box** **2012** and click on **Search Button** |
|  | Results matching the entered search criteria will be displayed in the results grid displayed at the bottom of the **Search Screen**. If no results are found in the application, “No Records Found” should be displayed.   * Click on **Tracking Number hyperlink** |
|  | The Annual Report Details pop-up window will be displayed.   * Click on **File Name hyperlink** to view non-confidential **Annual Report** |

* **View Deliberations Agenda**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **View Deliberations Agenda** **hyperlink**   * When clicked, the Deliberations Agendas (Regular, Special and Supplemental) will be listed by Session Date * To view Agenda for a specific Agenda Date, click on the associated **View hyperlink**      * **Pop-up window** will display selected Deliberations Agenda |

* **Submit a Comment in a Case**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Submit a Comment in a Case** **hyperlink**   * When clicked, the **Public Case Search Screen** will be displayed * Enter valid **Case Number in text box** and click on **GO Button**      * **Comment form** will be displayed |
|  | Case Details will be displayed in the top sections of the screen   * **Enter all required information indicated by a red asterisk ( \* )** |
|  | * Enter characters in text box for challenge-response test * If you cannot clearly distinguish characters, click on to display new set of characters. |
|  | * Click on **Post Comment Button** |
|  | * Public Comments will be posted on the Case File Screen for the specified case. |

* **Submit Complaints to the Consumer Assistance Division (CAD) – Residential**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Submit Complaints to the Consumer Assistance Division (CAD) hyperlink**   * When clicked, the **CAD Web Submission For Residential Screen** will be displayed by default * For this exercise, we are displaying the **Residential Screen** * Enter required data all required (\*) fields, add attachment if required and click on **Submit Button** |

* **Submit Complaints to the Consumer Assistance Division (CAD) - Business**

| **Step** | **Action** |
| --- | --- |
|  | From the **Public User *Home* Page**, click on **Submit Complaints to the Consumer Assistance Division (CAD) hyperlink**   * When clicked, the **CAD Web Submission For Residential Screen** will be displayed by default * Click on **Business Radio Button** * For this exercise, we are displaying the **Business Screen** * Enter required data all required (\*) fields, add attachment if required and click on **Submit Button** |

**For assistance, please contact Help Desk @ 207-287-3831**