**How To Training**

**for**

**Projects / Reports**

Reports/Projects are a collection of documents that are stored in the CMS application as a matter of convenience. Reports/Projects will be submitted and monitored in the application based on tracking numbers and report/project types. The Report/Project related submissions will include the set of activities for filing the reports/projects online.

The security status of the Reports/Projects Types will be predetermined and flagged as either public or confidential by the Clerk of the Commission as well as assigned Staff.

### Submit Project/Report

**Objective:**

* Submit Project/Report
* Searching for a Document

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| **Step** | Action |
|  | From the *Home* Page   * Click on Project/Report Files from the Access Menu * From the Submenu, click on Submit Project/Report |
|  | * Enter Required Information and click on Attach Document Button to attach document * Click on Submit Button |
|  | On Submit the following will occur   * Tracking number will be generated (format LLLL-YYYY-#####, where LLLL is the unique 4-digit code designated for the Report/Project Type). * Email notifications of project/report filing will be sent to Assigned Staff and Clerk of the Commission per workflow business rules * Submission will be available on the Public and External Registered User websites unless the Report/Project has been flagged as confidential by the Clerk of the Commission. * If flagged as confidential, the submission will only be available for viewing by the submitter, the Commissioners, Clerk of the Commission and the staff assigned to the Report/Project |

### Supplement Project/Report

**Objective:**

* Supplement Project/Report

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| **Step** | Action |
|  | From the *Home* Page   * Click on Project/Report Files from the Access Menu * From the Submenu, click on Supplement Project/Report |
|  | * Enter Tracking Number in the Project/Report Search Screen      * Click on GO Button   - OR -  If user does not know tracking number:   * Click on Search Button, enter known search criteria * Click on Search Button * Search result will display all Projects/Reports matching entered parameters * Note Tracking Number and go the Step 1 to continue |
|  | * Project/Report Supplemental Submission Screen will display   + Tracking Number, Report/Project Type and Report/Project Year   + Report/Project details will be displayed in next section * Enter Required Information in the Supplemental Submission Section      * Click on Attach Document Button to attach document * Click on Submit Button |
|  | On Submit the following will occur   * Submission will be appended to the existing Project/Report file. * Email notifications of project/report filing will be sent to Assigned Staff and Clerk of the Commission per workflow business rules * Submission will be available on the Public and External Registered User websites unless the Report/Project has been flagged as confidential by the Clerk of the Commission. * If flagged as confidential, the submission will only be available for viewing by the submitter, the Commissioners, Clerk of the Commission and the staff assigned to the Report/Project |

### View /Search

**Objective:**

* View Search Project/Report

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| **Step** | Action |
|  | From the *Home* Page   * Click on Project/Report Files from the Access Menu * From the Submenu, click on View/Search |
|  | Report/Project Submission Search Screen will be displayed     * Enter known search criteria and click on Click on Search Button |
|  | * Search Result grid will be displayed at the bottom of the screen   + Tracking Number   + Report/Project Type   + Utility Company Name   + Report/Project Year   + Title of Filing   + Submission Date |
|  | * Clicking on Tracking Number hyperlink will display   + Submission details   + Attached Document(s) details   + Click on File Name hyperlink to view attachment |