

Activities and Discovery System (ADS) Pilot Training

External Portal Overview

Welcome

- Thank you for attending the PUC Activities and Discovery System Pilot.
- Ask questions anytime during the training.
- Training will be recorded and posted to the PUC YouTube Channel.

Glossary

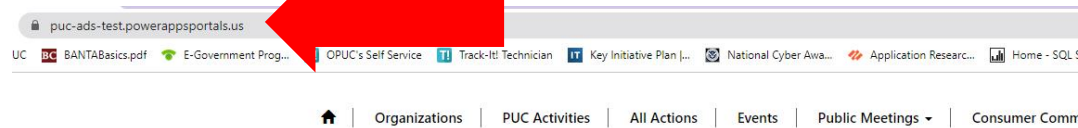
- PUC Activity: Docket
- ListSrv: Service List
- Organizations: Companies
- Consumer Comments: Comments made by the public, could related to a PUC Activity, a Public Meeting, something in general, or a complaint.
- Public Meeting Action: Comment made by Organization related to a Public Meeting.

Agenda

- Day One Morning
 - Pilot Overview
 - Pilot Expectations
 - Portal Roles Overview
 - Confidential Information and MFA
- Day One Afternoon
 - Portal Overview
- Day Two Morning
 - Organization Admin Setup
 - Organization Access Requests

Sandbox vs Pilot Production using dates below

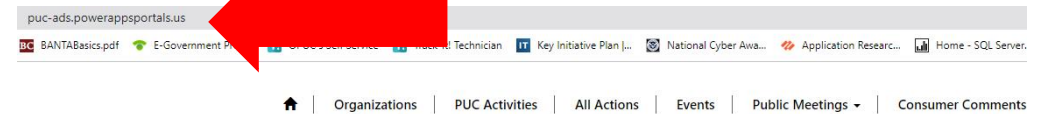
Sandbox



This portal is for testing and training purposes only.



Pilot Production



This is a Pilot Portal. Filings will only be accepted for UE 399 and UE 402.



Pilot Overview

- 8/15 - 8/19 is training, demo, and testing in Sandbox
- 8/22 - 9/16 is Pilot with real data in Production
- 8/22 Org Admin and other Org users request access in Production
- 8/22 PUC will remove all Test Accounts
- UE 399 and UE 406 only
- Used for Filing, Events, Discovery Requests and Responses.
- Public Meeting and Event information is updated on the ADS Portal and PUC External web page.

Pilot Expectations

- Only work with UE 399 and UE 406, don't add to any other Docket.
 - Filing center will decline any other Docket uploaded through ADS Portal.
 - Standard Filing Center email is still used for other Dockets.
- Public Meetings still on PUC web page, will show on ADS as well for only these 2 Dockets
- Real data
- We welcome Feedback (training, Portal user interface, usability)
- Prompt communication
- Expect delays if we run into issues. If ADS Submission of Action does not show up and the issue is communicated with PUC, either the issue is fixed and submission will show up on Portal or PUC will discontinue Pilot and upload all submissions to BizApps and eDockets.

Portal Roles Overview

- Public: any member of the public can view all or search for specific Organizations, PUC Activities, Actions, Events, and Public meetings.
- Registered Public: can subscribe to notification lists: PUC Activity, Order, Industry, Events. Can submit Consumer Comments. Can setup personal Profile in ADS
- Company Admin: can grant company users access as Filer, Discovery requestor and responder, read only roles. Cannot File or request or response to discovery requests unless granted specific role.
- Company Filer: can file on behalf of Organization
- Company Discoverer: can make Discovery Request or respond to Discovery Requests.
- Company Subscriber: similar to Registered Public, associated with the Organization, can view all Organization filed PUC Activities.

Confidential Information and MFA

- Confidential and Highly Confidential
- Petition to Intervene
- Signatory Page
- MFA – using registered email to send code

Q&A

Lunch

Afternoon sessions: Portal Overview

Portal Overview - Demo

- Public view and search
- Organization, Primary and Represented Organization
- PUC Activities
- Actions
- Events
- Public Meetings
- Register new contact
 - Email Lists
 - "MY" pages
 - "Organization" Pages
 - Filing
 - Discovery Request/Response
 - Public Meeting Actions

Q&A

Org Admin and Users register Portal accounts

8/16 Session

Organization Admin Setup

- Identify all Admins
- Register portal accounts
- Request Admin access to Primary Organization
- PUC Power User Approving Access Requests
- Confirm Account has Admin Privilege

Break

Organization Access Requests

- Identify Organization Users
- Register portal accounts
- Request Access
 - Filer
 - Discoverer
 - Subscriber
- Organization Admin approving requests
- Confirm access

Q&A