**Training Sessions**

**nFORM 4.9 Training**

**EXERCISE WORKBOOK**

**This exercise workbook accompanies the Windsor nFORM version 4.9 live online training. The exercises in this book are intended to be completed during the virtual training sessions.**

 **Access to all pre-recorded content will be provided as part of the training documentation.**

**SUBMISSION PROCESSOR TRAINING**

Video Link : [Exercise 1 - Intro To Dashboard.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%20-%20Sub%20Processor%20Training%20-%20Exercise%201%20-%20Intro%20To%20Dashboard.mp4?version=1&modificationDate=1595534792100&api=v2) Video length: 6:26 min

Exercise time: 15:00 min

# After video exercise:

1. **Sign into nFORM** <https://nformtest.windsorsolutions.biz/OKDEQ/> [ ]
2. **Go to the Dashboard** [ ]
3. **How many pages of submissions can you see and why might that be different from the person next to you? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
4. **How many Active submissions do you see? \_\_\_\_\_\_**[ ]
5. **How many days past due is submission # HP2-TM0R-6YY84? \_\_\_\_\_\_\_**[ ]
6. **How many of the active submissions were submitted by HOLLYFRONTIER TULSA REFINING LLC? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
	1. **How did you find that out? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
7. **Add Revision Number to your Dashboard and then only display Training organizations submissions that are Revision 2** [ ]
8. **How many of them are ON HOLD? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]

Video Link : [Exercise 2 - Intro To Sub Review Page.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%20-%20Sub%20Processor%20Training%20-%20Exercise%202%20-%20Intro%20To%20Sub%20Review%20Page.mp4?version=1&modificationDate=1595534771043&api=v2) Video length: 5:12 min

Exercise time: 15:00 min

# After video exercise:

1. **Go to the Dashboard** [ ]
2. **Filter to only find a 30 Day Report submission** [ ]
	1. **How did you do that? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
3. **Find the one with your name included in the alternate identifier. Select and view** [ ]
4. **What is the submission ID? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
5. **When was the status set to DRAFT? (Check History) \_\_\_\_\_\_\_\_\_\_\_\_** [ ]
6. **Assign the Review Step to yourself** [ ]
7. **Add an attachment?** [ ]
8. **What happens when you click the submitter’s name? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
9. **Print (or attempt to) the submission, but don’t include Internal Data or the Processing History.** [ ]
10. **Download a COPY OF RECORD. What type of document is downloaded? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
11. **Return to Home Page** [ ]

Video Link : [Exercise 3 - Begin Submission Review.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%20-%20Sub%20Processor%20Training%20-%20Exercise%203%20-%20Begin%20Submission%20Review.mp4?version=1&modificationDate=1595534774593&api=v2) Video length: 4:58 min

Exercise time: 20:00 min

# After video exercise:

1. **Go to the Dashboard** [ ]
2. **View the submission where your name is the Alternative Identifier** [ ]
3. **Lock the submission from entry while you review. How? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
4. **Use the View Form button to look at the submitted form** [ ]
5. **Add a NOTE to this section that the applicant CAN NOT see** [ ]
6. **Check the form and identify the first piece of missing information. Add a Correction Request asking the submitter to add correct the problem.** [ ]
7. **Add a PROCESSING ISSUE to “How high can you count?” letting your coworkers know this number is not high enough** [ ]
8. **Complete the Review, unlock, and send an email to the applicant** [ ]
9. **Return to the Overview and, using the Event Log, write down how many minutes your review was locked \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]

**--------------AT THIS POINT WE WILL PRETEND WE ARE AN APPLICANT-----------------**

## **Return to nFORM Home, Find Excess Emissions Immediate Notice form, fill it out completely (bogus data) and Submit and Certify (NOT PREVIEW MODE)**

## **- Select a company and facility (start typing)**

## **- Write down your submission ID and Alternative Identifier**

## **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]

Video Link : [Exercise 4 - Submission Revisions.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%20-%20Sub%20Processor%20Training%20-%20Exercise%204%20-%20Submission%20Revisions.mp4?version=1&modificationDate=1595534782167&api=v2) Video length: 4:01 min

Exercise time: 20:00 min

# After video exercise:

**--------------AT THIS POINT WE WILL PRETEND WE ARE AN APPLICANT-----------------**

1. **Return to nFORM Home, Find Excess Emissions 30-Day Report form, Use your submission ID from the Excess Emissions Submission \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
2. **First check your email – do you have Correction Requests? If so, make the changes using the email link. If not,**
	1. **Go to the History TAB from the nFORM Home Page**
	2. **Find a Submission that is not locked and view Summary** [ ]
3. **Revise the Submission – Are there correction requests, yet? If so, correct them…if not, change anything you want. Recertify and Resubmit** [ ]
4. **If we have time and you have an EXTERNAL Email Address, try to Register as an Alter-Ego, submit the form you created Yesterday. Check Both email addresses for confirmations.**
	1. **Practice being an External System User – Find and submit any form you want.**
	2. **If you didn’t create an external user account, Do Not use your Internal User abilities during this exercise.**

Video Link : [Exercise 5 - Finalize Submission.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%20-%20Sub%20Processor%20Training%20-%20Exercise%205%20-%20Finalize%20Submission.mp4?version=1&modificationDate=1595534786593&api=v2)Video length: 5:13 min

Exercise time: 15:00 min

# After video exercise:

1. **Log out of nFORM and log in again with your Internal Account** [ ]
2. **Navigate to the Dashboard and find a submission where You are the Assignee. (If you can’t find one, let Trainer know and they’ll assign you one)**[ ]
3. **Go to the Revisions and Compare two versions. Can you see what was changed? Scroll to the bottom and click Done.**[ ]
4. **Mark the Supervisory Review step as COMPLETE.**[ ]
5. **Assign the Decision Notification Step to Yourself and then REMOVE the Step entirely.**[ ]
6. **Use the Manage button to add a Processing Step**
	1. **Call it Email the Trainer**
	2. **Give it 5 days to complete**
	3. **Hide this step from the submitter**[ ]
7. **Add a Step Action to the Email the Trainer step**
	1. **Send Email Action**
	2. **On Step Complete**
	3. **Recipient Custom Email Address**
		1. **your personal email address**
		2. **Add some custom text**[ ]
8. **Return to the Processing Page of the submission review and mark this new step Complete.**[ ]
9. **Return to Summary Section and set the Status to DEEMED COMPLETE** [ ]