

How to use CPCS-ON System: PREPARING A BATCH FOR NOTIFICATION

Things you will need:

- The Batch information

What is the basic system functionality:

The system gives the functionality to notify CPCS of Technical Tests.

To create a notification, you need to create a batch to hold the notification in.

Every notification must be within a batch. A batch can contain just one notification or it can contain many notifications.

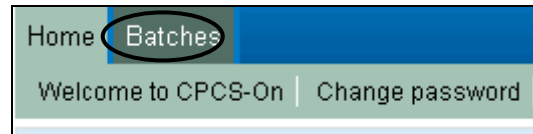
Summary of steps to complete the process:

- **Step One:** Create a Batch
- **Step Two:** Modify a Batch

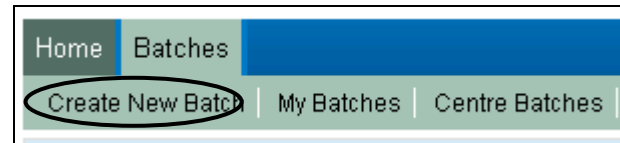
How to use CPCS-ON System: PREPARING A BATCH FOR NOTIFICATION

1. Step One: Create a Batch

1.1. To create a batch, click on the **Batches** button.



1.2. Then click on the **Create New Batch** button.



1.3. The following screen will be displayed which you can enter in your own **Batch Name** (if you leave it blank the system will generate a random one for you) and **Batch Purchase Order Reference** (this will remain blank if you do not enter a reference).

1.4. Click on the **Create** button.

A screenshot of the 'Create New Batch' form. At the top, there is a light blue header with the text 'You can leave the batch name blank to have a random name allocated.' Below this is a dark green header with the text 'Create New Batch'. The form contains two input fields: 'Batch Name' with the value '20080901 Notified' and 'Batch Purchase Order Reference' with the value 'PO123456'. At the bottom, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is circled in black.

Note: CPCS recommend that the batch name should contain the latest date by which the notifications can be submitted.

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1.5. You have created your batch, which now appears in the tab **My Batches**.



1.6. To explain the tabs you see:

- **My Open Batches:** shows all new and open batches which have yet to be notified
- **My Notified Batches:** shows all notified batches that have yet to be resulted
- **My Closed Batches:** shows all notified batches which have had the results recorded against the notification.

Batches have three statuses: Open (not yet notified), Notified (awaiting test results), and Closed (all results recorded).

My Open Batches My Notified Batches My Closed Batches

Batch Name	Purchase Order Reference	Cost of Batch	Created By	Date Created	Last Modified By	Notifications	Resulted	
20080901 Notified	PO123456	<u>Edit</u> 0	Test Centre User	17/07/2008 10:50:57	Test Centre User	0	0	<u>Open</u> <u>Delete</u>

Edit the batch name and Purchase Order reference.

Open the Batch

1.7. Your new batch will have some summary information to help guide you on the status of the batch:

- **Batch Name:** shows the name you entered as per step 1.3 (or the system generated Batch name if left blank)
- **Purchase Order reference:** shows the reference you entered as per step 1.3 (or will remain blank if no reference was entered)

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- **Cost of Batch:** shows how much the batch will cost (this will remain as 0 until a notification has been added)
- **Created by:** shows who created the batch
- **Date Created:** shows when the batch was created (Date and Time)
- **Last Modified:** shows who last modified the batch
- **Notifications:** shows how many notifications are in the batch
- **Resulted:** shows how many notifications have been resulted.

1.8. There are three operations that can happen to a batch:

- **Edit:** allows you to change the Batch name and Batch Purchase Order Reference
- **Open:** allows you work on the batch and add notifications
- **Delete:** allows you to delete an empty batch (you cannot delete a batch if it contains notifications).

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2. Step Two: Modifying a batch

- 2.1. Click on the **Edit** button to make changes to the **Batch Name** and/or **Batch Purchase Order Reference**.
- 2.2. Click on the **Submit** button to save your changes.



Home | Batches | Monitor Reports | Search | Library

Create New Batch | My Batches | Centre Batches

Edit Batch: MeI - User Guide

Summary

Batch Name:	<input type="text" value="User Guide"/>
Batch Purchase Order Reference:	<input type="text" value="04 February 2009"/>
Created By:	Melanie Edwards
Date Created:	04/02/2009 17:47:24
Date Last Modified:	04/02/2009 17:55:15
Last Modified By:	Melanie Edwards
Number of Notifications:	0
Number of Notifications Resulted:	0
Cost to Date (£):	0
Batch Status:	Open
Notification Clashes:	0

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2.3. Click on the **Open** button so that you can begin working with the batch.



2.4. You are then shown a Summary page which shows additional information:

- **Batch Status** – Open - shows all new and open batches which have yet to be notified
- **Notification Clashes** - A Clash is where an:
 - Individual has been booked in for two or more tests that overlap in date and time, or
 - a Tester has two or more tests booked that overlap in date and time.

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Batch: User Guide

Summary Notifications

Batch Name:	User Guide
Batch Purchase Order Reference:	04 February 2009
Created By:	Melanie Edwards
Date Created:	04/02/2009 17:47:24
Date Last Modified:	04/02/2009 18:04:14
Last Modified By:	Melanie Edwards
Number of Notifications:	0
Number of Notifications Resulted:	0
Cost to Date (£):	0
Batch Status:	Open
Notification Clashes:	0

List Batches Edit Batch Add Notification Submit Batch

- 2.5. By clicking the **Notifications** tab, you can review the notifications within a batch. If no notifications have been created within a batch it will be empty.

Batch: 20080901 Notified

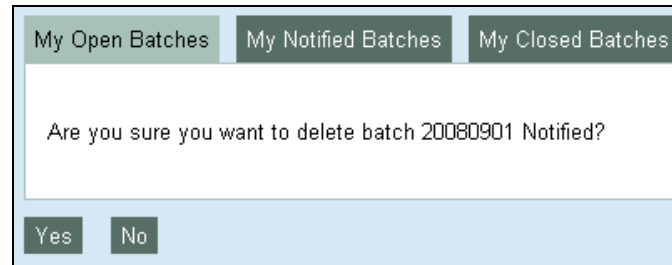
Summary Notifications

Add Notification Submit Batch

- 2.6. If you have created a batch in error, the system will allow you to delete the batch by clicking on the **Delete** button.

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2.7. A batch can only be deleted if it is empty of notifications.



2.8. Selecting “**Yes**” here will delete the batch, selecting “**No**” will keep the batch, but you can still delete it later if you wish.

2.9. You can return to the batch listing by clicking on **My Batches**.



Note: **My Batches** only allows you to view Batches that you have created for the CPCS Test Centre you are logged in to and **Centre Batches** allows you to view all Batches that have been created by other users at the CPCS Test Centre you are logged in to.