How to use CPCS System: SEARCHES

CP Construction Plant
CS Competence Scheme

Things you will need before starting this process:

- The basic details for an Individual
- The basic details for a Tester
- The Batch Name, Purchase Order Ref No or Test Ref No.

What is the basic system functionality:

The CPCS-ON system allows you to:

- Search for an Individual within the Phoenix Database
- Search for an Individual notified at your Test Centre
- Search for an Individual who has achieved a Technical Test at any Test Centre
- Search for a Peripatetic Tester
- Search for a Batch at your Test Centre

Summary of steps to complete the process:

- **Step One:** Navigate to Searches
- **Step Two:** Select a Search Type
- **Step Three:** Enter in the Details
- **Step Four:** View Results

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1. Step One: Navigate to Searches

1.1. Once logged into the system, navigate to the **Search** button at the top of the menu bar.

Home	Batches	Monitor Reports	Search	Library	
Individuals	Test Centre Notifications	All Notifications	Peripatetic Tester	Batches	

2. Step Two: Select a search type

2.1. There are five options available to search:

- **Individuals:** will search the whole Phoenix database for an Individual
- **Test Centre Notifications:** will search for an Individual within the CPCS-ON System for your Test Centre
- **All Notifications:** will search for an Individual within the CPCS-ON system for all Test Centres
- **Peripatetic Tester:** will search for a Tester within in the CPCS-ON System.
- **Batches:** will search for a Batch within the CPCS-ON system for your Test Centre

Home	Batches	Monitor Reports	Search	Library	
Individuals	Test Centre Notifications	All Notifications	Peripatetic Tester	Batches	

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3.   Step Three: Enter in the details

3.1.   The details required for each search is different, there are up to three pieces of information you will need in order to locate an individual and your search must contain:

- Individuals:
    o   Registration Number **and**
    o   Surname **or**
    o   Date of Birth.

- Test Centre Notifications:
    o   Registration Number **or**
    o   Surname **or**
    o   Date of Birth.

- All Notifications:
    o   Registration Number **and**
    o   Surname **or**
    o   Date of Birth.

- Peripatetic Tester:
    o   Category **or**
    o   Postcode **or**
    o   Sector

- Batches:
    o   Batch Name **or**
    o   Purchase Order Ref No **or**
    o   Test Ref No.

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3.2.   Click on the **Search** button to perform the search.

Search Full Database

ID Number   1905657   To search the full database you must enter the ID Number and one of the following:

Surname   edwards   • Surname

Date of Birth   02/09/1970   • Date of Birth

Search   Clear

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4. Step Four: View Results

4.1.   If the selected search was **Individuals** within Phoenix and the individual was found the results shown will be:

- **Scheme Membership:** Type of Card held and
- **Health and Safety Membership:** Date and Type of Test Passed

Search | Clear

Name:	Melanie Anne Edwards
ID Number:	1905657
Date of Birth:	02/09/1970

Scheme Membership

Card Type	Start Date	Expiry Date
CPCS Technical Test (not card)	02/03/2010 09:00:00	-
Categories	**Start Date**	**Expiry Date**
Telescopic Handler	02/03/2010 09:00:00	01/03/2012 09:00:00
Card Type	Start Date	Expiry Date
CSCS	02/06/2009	02/06/2014
Regular Visitor		
Categories	**Start Date**	**Expiry Date**
Regular Visitor		
Health and Safety Tested	-	-
Regular Visitor	-	-

Health and Safety Membership

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4.2.   From here you can click on the **Clear** button to begin another search.

4.3.   If the selected search was **Test Centre Notifications** it would be locating an Individual within CPCS-ON and if the individual was found the results shown will be the Technical Test Notifications undertaken at your Test Centre only.

From this screen you can click on:

- **Batch Name:** This will take you to the batch summary page
- **Application Form:** (for Standard Practical/OSA Tests only)
- **Achievement Letter:** (for Standard Practical Tests only)
- **View Notification:** This will take you to a read only version of the Notification Wizard
- **Edit:** If the batch is an Open Batch, you can edit the Notification
- **Result:** If the batch is in a Notified or Closed Batch, you can enter or view the Technical Test result.

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4.4.   From here you can click on the **Clear** button to begin another search.

4.5.   If the selected search was **All Notifications** it would be locating an Individual within CPCS-ON and if the individual was found the results shown will be all **Achieved** Technical Test Notifications undertaken at all Test Centres. The only information returned would be:

- Category

- Test Level

- Test Type

- Test Date/Time

4.6.   From here you can click on the **Clear** button to begin another search.

4.7.   If the selected search was **Peripatetic Tester** it would be locating a Tester within CPCS-ON who has given their consent to be contacted to deliver Technical Tests to another Test Centre, the information returned would be:

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- Tester Name

- Postcode

- Telephone Number

- Email

- Categories

Find Peripatetic Tester		
Category	A09	To search the testers database you must enter a category with the following being optional:
Postcode	mk42	• Postcode
Sector		• Sector

Search   Clear

Tester Name	Postcode	Telephone	Email	Categories
Edwards, Melanie	MK42 9XD	000	mel.edwards@cskills.org	A02, A06, A09, A14

4.8. From here you can click on the **Clear** button to begin another search.

4.9. If the selected search was **Batches** it would be locating any batch/notification within CPCS-ON that matches the selected criteria for your Test Centre

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4.10. For all search fields the following details will appear:

4.11. By selecting **open** the batch/notification can be interrogated further.

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Batch: Test batch for user Guide

Summary | Notifications

Batch Name:	Test batch for user Guide
Batch Purchase Order Reference:	123456
Created By:	Mel Centre Edwards
Date Created:	24/03/2010 15:43:25
Date Last Modified:	24/03/2010 15:49:35
Last Modified By:	Mel Centre Edwards
Number of Notifications:	2
Number of Notifications Resulted:	0
Cost to Date (£):	50
Batch Status:	Notified
Notification Clashes:	0

List Batches | Edit Batch | Add Notification | Submit Batch

Home | Batches | Monitor Reports | Search | Library

Create New Batch | My Batches | Centre Batches

Batch: Test batch for user Guide

Summary | Notifications

Test Ref	Individual ID	Individual Name	Site	Category	Tester ID	Test Level	Test Type	Test Date/Time	Cost (£)	Clashes	Resulted	Result			
84849	3111097	Sarah Sample	200	A61	133730	Standard	Theory	12/04/2010 08:00:00	25	0		Pending Achievement	View	Edit	Result
84850	3111097	Sarah Sample	200	A61	133730	Standard	Practical	12/04/2010 09:16:00	25	0		Pending Achievement	View	Edit	Result

Add Notification | Submit Batch | Print All Selected

4.12. From here you can click on the **Search** button to begin another search.

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