

Guidance Leaflet

CIS TLS 5.3

Batch Management

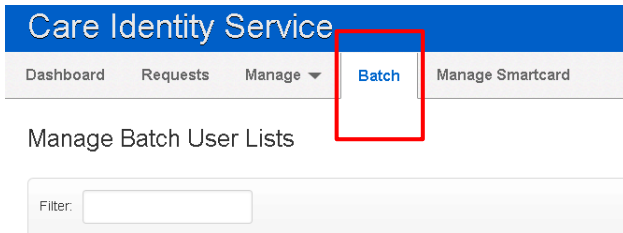
- **RA Manager**
- **Advanced - RA Agent**

Batch Management

RA Manager / Advanced RA Agents

CIS allows the use of a Batch process to carry out changes to a group of selected User's.

From the CIS Dashboard select the Batch menu.



From the Batch menu you can search / open / filter a previously saved Batch.

Or create a fresh selection of users.

>> Scroll Down >> Create User batch

This will require a Batch Name and an optional description may be added.

CreateUser Batch

Batch code: ...

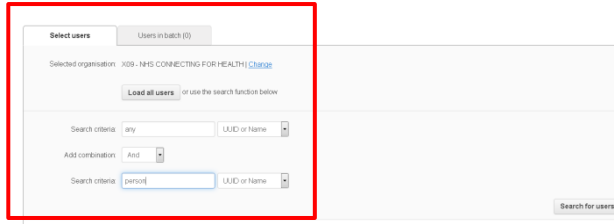
*Batch name:

Batch description:

479 characters left

Filter tools will allow the selection of users.

BATCH MANAGEMENT



879 users found.

Filter:

A selection of users may be made, applying a 'tick' to the left.

<input checked="" type="checkbox"/>	8896 1141 9512
<input checked="" type="checkbox"/>	9739 0573 5542
<input type="checkbox"/>	8472 0925 5540

[Select all](#) | [Deselect All](#)

Showing: 1 to 7 of 7 (filtered from 879 entries)

Option to **Select / Deselect all**.

When selection made:

>> Select >>

Add to this batch

This batch file may then be saved as draft for later amendment.

Save as draft

If saved, access by Dashboard 'Batch' menu:

>> Filter >> Select >>

Manage Batch User Lists

Success: Batch Guidance Batch saved

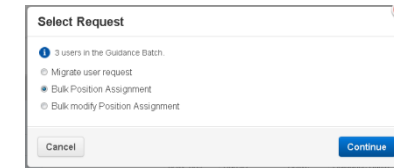
Batch code	Batch name	Total users	Created by	Last modified by	Last modified on	Status
000025	Guidance Batch	0	Search_Marketed_Smartcard_User_MX	Search_Marketed_Smartcard_User_MX	27-Jan-2015	Draft

When required the draft or current batch request may be created

>> Select >>

Create request

The relevant Option may be selected applying to the selected users. In this example 'Bulk Position Batch' selected.



Assign Position

Valid date format is DD-MM-YYYY, for example 12-Jun-2015

*At least one position needs to be added

[Add Position](#)

>> Scroll Down >>

Add Position

Select the desired Position to apply to the selected users.

Add Positions

Position code	Position name	Org code
050002020107	DAQ RA Agent C/Check	X09
05001160893	DAQ RA Manager	X09
05001160899	DAQ RA Sponsor	X09

Confirm Position

Approval authority required!

Confirm assignment