

PPS Compendium

What is PPS Compendium?

PPS (Postal Payment Services) Compendium is a web-based system for managing your postal payments. It is based on requests. You can create new requests, view, modify or delete existing requests, or submit requests to the UPU for processing.

You can also view published documents (data published by postal operators and visible to all users) and run reports.

All PPS Compendium functions are available from the **PPS** menu on the main page.

Compendium Users

There are three types of Compendium users: Public, Editors and Administrators.

- Public users can only view published documents
- Editors can modify and publish documents for their own postal organization
- Administrators can modify and publish documents for all postal organizations, and perform other administration tasks, such as creating new topics and documents

See the specific help for each function in the menu for more detailed information.

PPS

The PPS menu

The PPS menu includes:

- functions for editors to view, edit and submit requests for publication
- functions for administrators to create and update requests
- functions for administrators to create and run reports

You can return to the main page at any time by clicking the Home icon.

Quick access icons

Each function in the menu loads a list of items for you to work on. For each function, PPS Compendium includes a set of icons for quick access to the operations you need to perform. Icons for operations that can be performed on the whole list are displayed at the top of the list. Some of these are:

	Create a duplicate of an existing item
	Open all listed items in an Excel, PDF or CSV file
	Print the listed items
	Select or unselect all items in the list
	Reload data

Icons for performing operations on individual list items are displayed next to each item. Some of these are:

	View
	Edit
	Create
	Delete
	Run (e.g. a report)
	Propagate (e.g. a topic)

Sorting and filtering the display

You can sort the columns by clicking the arrows at the top, and you can filter the list of documents displayed by entering criteria on which to filter at the bottom of the screen. Some lists also include a search box at the top.

PPS : View Published Documents

What is View Published Documents?

When you click **View Published Documents**, PPS Compendium displays a list of all the documents published by postal operators in the Compendium.

Who can use View Published Documents?

All users can view documents in **View Published Documents**.

What can you do in View Published Documents?

- View the French or English version of a document
- Expand and collapse sections of the document
- Show changed data only (denoted by a flag next to the relevant sections); changed data is data which is different to the last value published in the database
- Refresh the display to show the latest changes in the system
- Print documents

To perform any of these operations, click the *View* icon next to the document in the list, then click the required operation in the function bar at the top of the document.

PPS : View Archived Documents

What is View Archived Documents?

When you click on **View Archived Documents**, PPS Compendium displays a list of all the documents archived in the Compendium. A document is archived when a newer version of the same document is published.

Who can use View Archived Documents?

Archived documents can be viewed by Compendium Editors and Administrators.

What can you do in View Archived Documents?

- View the French or English version of a document
- Expand and collapse sections of the document
- Show changed data only (denoted by a flag next to the relevant sections); changed data is data which is different to the last value published in the database
- Refresh the display to show the latest changes in the system
- Print documents

To perform any of these operations, click the *View* icon next to the document in the list, then click the required operation in the function bar at the top of the document.

PPS : Manage My Requests

What is Manage My Requests?

Organizations use **Manage My Requests** to view or update their own requests.

Who can use Manage My Requests?

Compendium Editors

What can you do in Manage My Requests?

- View or update the request in French or English
- Expand and collapse sections of the request
- Show changed data only
- Submit the request for publication
- Print the request

To view a request:

1. Click the *Edit* icon next to the request in the list.
2. Choose whether to view the English or French version of the request, by clicking the **French** or **English** icon at the top of the page.
3. Show changed data only if required, by clicking the **Show Changed Data** icon at the top of the page. Changed data is denoted by a flag icon; this means that the data has changed relative to the data from the last published version of the request.

To update a request:

1. Click the *Edit* icon next to the request in the list.
2. Make your changes to the request and click **Save** on the function bar at the top of the screen. Any changes appear with a pen icon next to them until you click **Save**.
3. When you have finished changing the request, you can send it to the UPU for validation and publication by clicking **Submit**. The state of the request changes to **In Progress**.

Publishing requests

When you submit requests for publication to the UPU, the UPU processes them by revising or translating them into French or English. Requests are then published and become available to all operators.

The UPU may reject a request if it is incomplete. In such cases, requests are moved back to **Draft** state. You can then correct any problems, and resubmit it.

PPS : Manage Requests

What is Manage Requests?

Manage Requests is an administrator-level function allowing administrators to view, update and publish requests for all Compendium organizations.

Who can use Manage Requests?

Compendium Administrators

What can you do in Manage Requests?

- View, update and print requests in French or English
- *For requests in Draft state:* Update and submit for publication
- *For requests in Submitted state:* Accept or reject requests for publication
- *For requests in Published state:* Add new sections

To view a request:

1. Click the *Edit* icon next to the request in the list.
2. Choose whether to view the English or French version of the request, by clicking the **French** or **English** icon at the top of the page.
3. Show changed data only if required, by clicking the **Show Changed Data** icon at the top of the page. Changed data is denoted by a flag icon; this means that the data has changed relative to the data from the last published version of the request.

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PPS : Manage Reports

What is Manage Reports?

You use **Manage Reports** to create new reports. Once the Administrator has created a new report, it subsequently becomes available for Compendium Editors to run it from **Run Reports**. You can create two types of reports:

- *Form reports* list all operators that have given a specified answer in their questionnaire to one particular topic, e.g. all operators answering 'yes' to whether they offer an urgent sending service for cash money orders
- *Data reports* list all the responses of all operators to a specified list of topics, e.g. all sending service types specified by all operators for cash money orders

Who can use Manage Reports?

Compendium Administrators

What can you do in Manage Reports?

- Create new reports and edit existing ones
- Delete reports
- Run reports

To create or edit a report:

1. Click the Edit icon next to the report in the list, or the Create icon (plus sign) above the list.
2. Click the Labels tab.
3. Enter the Query Name. This is an internal name.
4. Enter the ID of the Compendium to which the report applies.
5. In Query Result, choose a Form or Data type of report (for more details on the report types, see the description in What is Manage Reports? above).
6. Enter the Query Label in the required language(s). This is the report name that is displayed in the list.
7. Click the Details tab. The details you enter depend on the report type specified:
 - For Form reports, enter the details of the topic to query for the report, and specify the answer required for the corresponding operator to be included in the report.
 - For Data reports, click New to add a topic for inclusion in the report. Click Save and New to add another topic, or Save if you have finished.
8. Click Save to save your changes.

To run a report:

1. Click the *Run* icon next to the report in the list.
2. Display the report in Excel or PDF format if required, by clicking the corresponding icon above the list.

To delete a report:

1. Click the *Delete* icon next to the report in the list.

PPS : Run Reports

What is Run Reports?

Organizations use **Run Reports** to run reports previously created with the **Manage Reports** function. You can open reports as an Excel or PDF file.

For more information on reports, see the **Manage Reports** help.

Who can use Run Reports?

Compendium Editors

What can you do in Run Reports?

To run a report:

1. Click the Run icon next to the required report. The Compendium runs the report and displays the results.
2. If required, open the report in Excel or PDF format by clicking the icon above the list.