Managing Batches
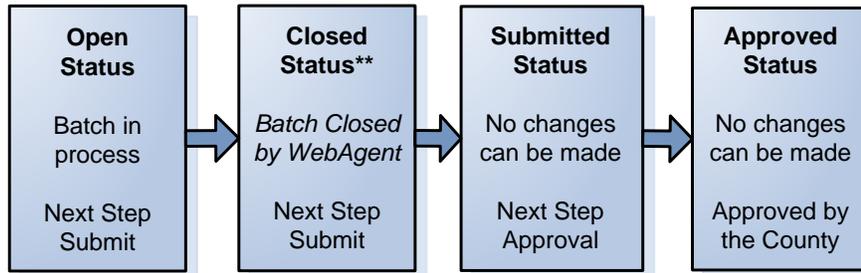
Batches are created as renewals are processed. There are four batch statuses and the diagram below shows the flow of a batch.

Open Status	**Closed Status****	**Submitted Status**	**Approved Status**
Batch in process	*Batch Closed by WebAgent*	No changes can be made	No changes can be made
Next Step Submit	Next Step Submit	Next Step Approval	Approved by the County

What you can do within each batch is determined by the batch status and the authorized actions given to you in webSub. The following is a list of the available actions within each batch status:

Open Status → Submit Batch, and View, Reprint, or Void renewals in batch

Closed Status → Submit Batch, and View, Reprint, or Void renewals in batch

Submitted Status → View Only, only the county can make changes

Approved Status → View Only, no changes can be made

A county establishes limits for all batches for each location.

WebSub limits include:

- Number of days in a batch cannot exceed 7 days
- Number of renewals in a batch cannot exceed 1,000

When one of the number of days or number of renewal limits set by the county are reached, webSub will automatically close the batch and begin another batch with the next processed renewal. **Closed status only occurs when one of the limits is reached.

It is up to your location to <u>submit</u> the batch to the county. A batch can be submitted in both an open or closed status, however; you should submit batches based on your county's preference.

Viewing Batches

To see a list of batches to view, select "Manage Batches" from the Actions Menu.

Filters can assist you in locating a batch. Batches are automatically filtered to show only those within a 30-day period. You can also filter by batch status.

The Actions column lists the actions available for each batch.

Manage Batches

	Start Date	End Date	Batch Status	
	08/27/2012	09/26/2012	All ▾	Filter	Reset

Actions	Batch ID ▲	Status ⇕	County ⇕	Date ⇕	Time	Count ⇕	Reprin
View Submit	3662	Open	WILLIAMSON	09/20/2012	04:18 PM	1	
View	3501	Submitted	WILLIAMSON	08/31/2012	09:36 AM	0	

Export data to Excel / **Generate Report**

Daily Report   Cancel

Manage Batches Page

Texas Department *of* Motor Vehicles

You can view different levels of information for each batch.

Level 1. Viewing the Manage Batches page will list all the batches for your location. Click "View" on a batch to see the details.

Level 2. Viewing the Batch Detail page will list each renewal that was processed within that specific batch by license plate number. Click "View" on a plate to open the Vehicle Record.

Level 3. Viewing the Vehicle Record contains vehicle and transaction information.

Submitting Batches

In order to submit a batch, the Actions column must show Open or Closed as the status.

Step 1. On the Manage Batches Page, find the batch you need to submit to your county. Click "Submit".
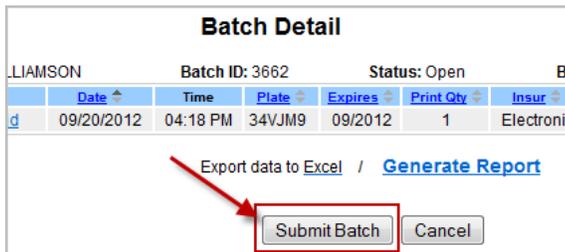
Step 2. Click "Yes" to confirm.

The status changes automatically to submitted.

You can also Submit a batch from the Batch Detail Page.

Step 1. From the Manage Batches page, find the batch you need to submit to your county. Click "View."
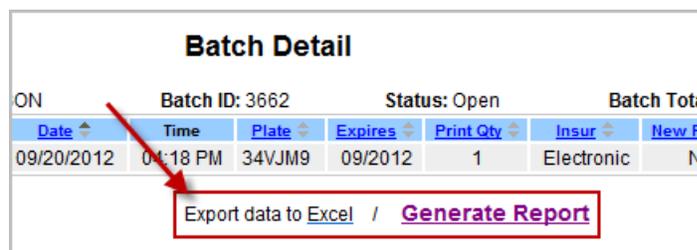
Step 2. Near the bottom of the page, Click "Submit."

Step. 3 Click "Yes" to confirm.

You are returned to the Manage Batches page and the status updates to submitted.

Batch Detail Page

Printing Batches

Batches can be printed in a PDF or Excel format. Select "Generate Report" to get a PDF or select "Export data to Excel" to get an Excel report. Reports printed using these two formats will print all transactions within a specific batch.

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This report allows an Agent or TAC location to print reports based on a specific day instead of a specific batch.

Step 1. Select Manage Batches from the Actions Menu.

Step 2. Select "Daily Report."

Step 3. Enter the date you would like to print a report for and select "Choose." If no transactions match the date entered the message "No renewals were found for the date entered" will display.

If the search is successful, all transactions for that date will be listed on the screen regardless of batch number, batch status or county associated with the renewal.

Step 4. Select "Generate Report" to print a PDF or click "Export data to excel" to print an Excel report of the transactions.

Example of Daily Report Results

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