



# Contracted Work & Administration (CWA) Quick Guides

## Submitting via Bulk Load (Case Management System)

### Your Case Management System File

Many **Case Management Systems** (CMS) export data by creating files. If that file is compatible with the CWA specifications you can export your monthly submission from your CMS and bulk load it on to CWA.



XMLbulkloa...



CSVbulkloa...



TXTbulkload file.txt

CWA requires one of three types of file for bulk loading:

**XML, CSV, TXT**

Only these types of file will be accepted for bulk load and they must comply to strict bulk load specifications to be successful.

Please contact your **software supplier** for help on how to create your bulk load file. Once you have your file and you know the location where it is saved you can proceed to the next step.

### Access Activity Management

Log into CWA via the Online Portal to bulk load your file. You will need to choose the **CWA Activity Reporter Manager** role or **CWA Activity Reporter** role .

**NB:** You can enter and save outcomes using the CWA Activity Reporter role, but you will need the CWA Activity Reporter Manager role in order to submit your claim.

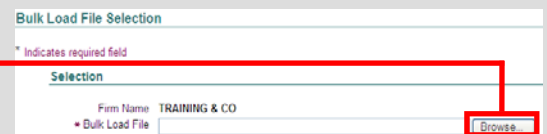
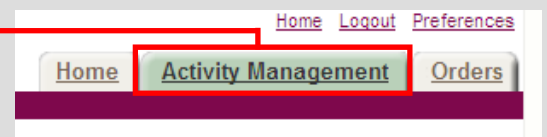
#### Navigator

- [CWA Activity Reporter \(External\)](#)
- [CWA Activity Reporter Manager \(External\) role](#)
- [CWA Designated Signatory \(external role\)](#)
- [CWA Firm Manager \(external role\)](#)
- [CWA Firm Sysadmin \(external role\)](#)
- [CWA Office Manager \(external role\)](#)
- [CWA Reference Data Clerk \(external role\)](#)

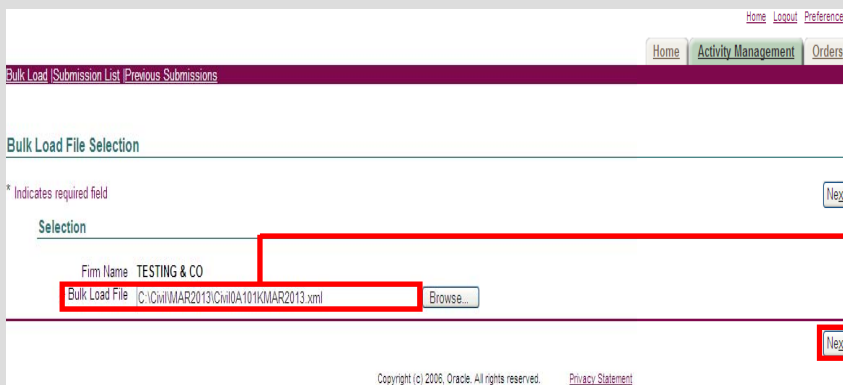
CWA Activity Reporter Manager (External) role  
[Home Page](#)

Click on the '**Activity Management**' tab.

Once in the Activity Management area you can browse for your bulk load file by clicking on the '**Browse**' button.



### Bulk Loading the file



A file selection window will pop up, you can now find your CMS bulk load file.

Double click the file, or select it and choose open.

The location of the file will be displayed in the '**Bulk Load File**' box.

Click '**Next**' to bulk load your file.

## Confirmation Screen

Confirmation

Do you wish to load your successful and problem outcomes? Invalid and duplicate outcomes will not be loaded.

**Bulk Load Results**

Printable Page Export No Yes

**Bulk Load Information**

Firm Name TRAINING & CO

**Bulk Load Summary**

Summary Id	Account Number	Schedule/Submission Reference	Total Outcomes	Successful Outcomes	Problem Outcomes	Duplicate Outcomes	Invalid Outcomes	MMIS
542534	0A101K	0A101K/CIVIL	8	8	0	0	0	

**Bulk Load Errors**

Summary Id	Matter Type / Stage Reached	UFN	Client	Surname	Error Type	Description
No results found.						

Printable Page Export No Yes

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Your file may take a few minutes to load and check, whilst this is happening please do not click any other buttons on your browser.

When the file has been checked the **Bulk Load Results** will be displayed. Here you can see there are 8 successful outcomes.

The **Bulk Load Errors** table displays the errors connected to the unsuccessful outcomes. **Problem outcomes** can be loaded but will need to be corrected. **Invalid and Duplicate outcomes** will not be loaded.

For more information on bulk load problems, please see the **Bulk Load Troubleshooting Quick Guide**.

Click **'Yes'** to load the successful and problem outcomes on to CWA.

## Viewing your outcomes (Step 1)

**Bulk Load Submissions**

Terms & Conditions

**Bulk Load Submissions**

Firm Name	Account Number	Office Name	Submission Type	Submission Period	Schedule/Submission Reference	Status
TRAINING & CO	0A101K	TRAINING & CO	LEGAL HELP	APR 2013	0A101K/CIVIL	INCOMPLETE

Printable Page Export

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You will now be able to view the submission that you have just updated. To view the outcomes click on the **'Update'** icon.

Here you can see the list of all the outcomes for this submission. You can **add, edit and delete** outcomes here.

If the values of the outcomes are not shown, **Select All** and Click **'Get Price'**.

Click **'Next'** to move to the review screen.

Submission Details Submission Review Submission Summary

Outcome Pricing Details Printable Page Export Step 1 of 3 Next Save

Firm Name TRAINING & CO  
Account Number 0A101K  
Office TRAINING & CO

Submission Period APR 2013  
Schedule/Submission Reference 0A101K/CIVIL  
Submission Type LEGAL HELP

**Outcome List**

Select Object	Details	Get Price	Add Outcome
<input type="checkbox"/>	0A101K/CIVIL	091012/001	18081983/MTAYL

Return to Bulk Load Submissions

Outcome Pricing Details Printable Page Export Step 1 of 3 Next Save

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## Summary and Submission (Steps 2 and 3)

Submission Details Submission Review Submission Summary

Outcome Pricing Details Printable Page Export Back Step 2 of 3 Next Save

Firm Name TRAINING & CO  
Account Number 0A101K  
Office TRAINING & CO

Submission Period APR 2013  
Schedule/Submission Reference 0A101K/CIVIL  
Submission Type LEGAL HELP

**Summary**

Number of Outcomes	Total Reported Profit Costs	Total Reported Disbursement Costs	Total Reported Counsel Costs	Total Reported Costs
1	£ 343.01	£ 0.00	£ 0.00	£ 343.01

Total Submission Value: £

**Outcomes**

Case Reference	UFN	ICR	Client Forename	Client Surname	Matter Type	Stage Reached	Outcome for Client	Value	Exp.	Status	View Outcome
53435	091012/001	18081983/MTAYL	MICHAEL	TAYLOR	FAMK:FADV	FB	FC				View

Outcome Pricing Details Printable Page Export Back Step 2 of 3 Next Save

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The review screen (**Step 2**) allows you to review your outcomes before you submit them.

If you are happy with your outcomes click **'Next'** to continue.

**Step 3** shows a summary of the whole submission.

If you are making a civil submission you will be able to check and edit your New Matter Starts.

Immigration providers will be able to check and edit their CLR data using the CLR Information button.

If you have entered all of the data for the month you can now submit by clicking the **'Submit'** button.

A confirmation screen will appear, click **'Yes'** to submit. Once you have confirmed you wish to submit you will not be able to make any further changes to your submission.

Category	Schedule	Deference	Disbursement Area	Access Point	Delivery Location	Matter Starts
Debt	0A101K/2013/15		Staffordshire	No Access Point		0
Family	0A101K/2013/15		Shropshire	Telford & Wrekin		0
Housing	0A101K/2013/15		Wakefield	No Access Point		0
Immigration - Asylum	0A101K/2013/15		Brook House IRC	Fast Track		0
Actions Against the Police/Public Body	0A101K/SCC/15		Merseyside	No Access Point		0
Clinical Negligence	0A101K/SCC/15		Yorkshire and Humber	No Access Point		0
Family	0A101K/SCC/15		Bexley	No Access Point		0
Mental Health	0A101K/SCC/15		ECF Matter	ECF Matter		0
Residual/Miscellaneous	0A101K/2013/15		Tolerance	Tolerance		0

Recalculate Total 0