



Contracted Work & Administration (CWA) Quick Guides

Submitting using the Bulkload Spreadsheet

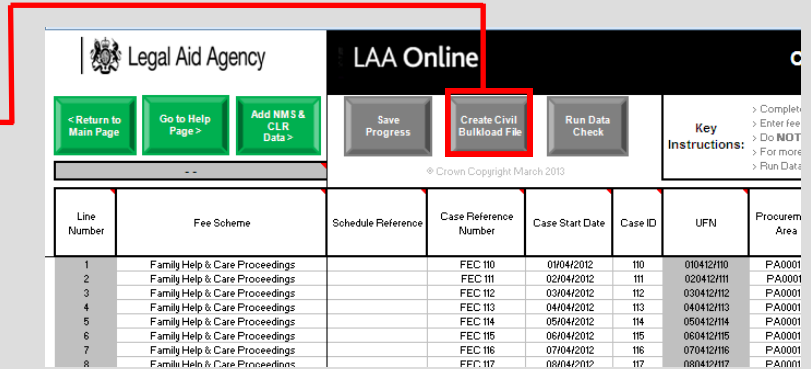
This guide assumes you are familiar with using the **Bulkload Spreadsheet**. It will show you how to **create a CSV file**. A CSV file is a data file which you can then load directly onto CWA.

If you are not familiar with the Bulkload Spreadsheet please see the **Bulkload Spreadsheet user guide** for a detailed explanation.

Creating the CSV file

Click **'Create Civil / Criminal / Mediation Bulkload'** and follow the instructions to create the CSV file.

The instructions will also tell you where the CSV file will be saved. Make a note of this location as you will need to find the file to load onto CWA.

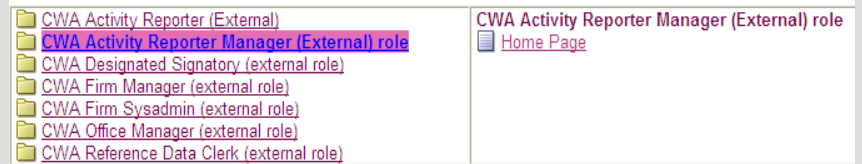


Access the Bulkload screen

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.

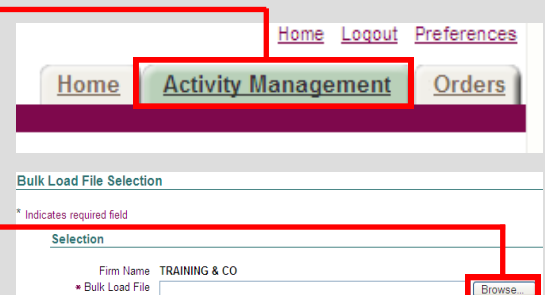
NB: You can bulk load your data using the CWA Activity Reporter role, however you will need the CWA Activity Reporter Manager role in order to submit your claim.

Navigator

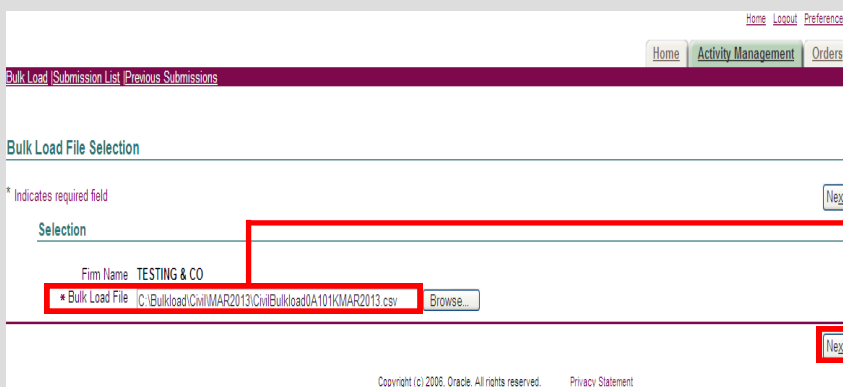


Click on the **'Activity Management'** tab.

The Bulk Load screen is displayed. Browse for your CSV file by clicking on the **'Browse'** button.



Bulk Loading the file



A file selection window will pop up, you can find the file at the location specified by the bulkload spreadsheet earlier.

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

Bulkload Summary

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

Bulkload Errors

Summary Id	Matter Type / Stage Reached	UPN	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

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

Printable Page Export Update

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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

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

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

Select Object	UPN	MCN	Client Forename	Client Surname	Matter Type	Stage Reached	Outcome for Client	Value	Exc.	Status	View Outcome
<input type="checkbox"/> 53435	091012/001	18081993/M/TAYL	MICHAEL	TAYLOR	FAMK:FADV	FB	FC				Edit

Return to Bulk Load Submissions

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Summary and Submission (Steps 2 and 3)

Submission Review

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/CIVL
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	UPN	MCN	Client Forename	Client Surname	Matter Type	Stage Reached	Outcome for Client	Value	Exc.	Status	View Outcome
53435	091012/001	18081993/M/TAYL	MICHAEL	TAYLOR	FAMK:FADV	FB	FC				Edit

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.

How Matter Starts Category	Schedule Reference	Procurement 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	Walsfield	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