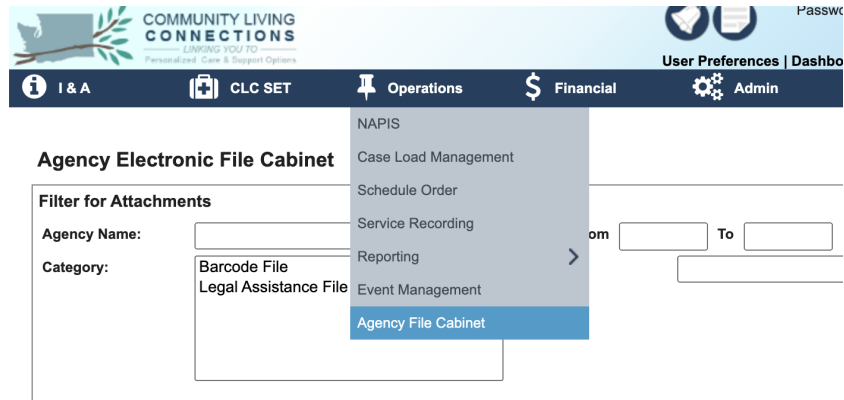


# Quick Guide

## Agency Electronic File Cabinet

The Agency Electronic File Cabinet is used to upload both Barcode Files (Units Imports), as well as Legal Assistance Files (Case Data). Below you will find steps on how to upload files for each.

Location of page: Operations > Agency File Cabinet



This tool is where the **Barcode Files (Units Imports)** occurs.

**Agency Electronic File Cabinet** Reports ▼

**Filter for Attachments**

Agency Name:  Date Range: From  To

Category: 

- Barcode File
- Legal Assistance File

 Staff ID:

File Name	Category	Date Attached	Size	Staff Name	Agency Name	Status
Attachment: <input type="button" value="Browse"/>						

Click Browse

Attachment:

Search for your agency's name.

Click Add to search your local computer for the file to upload.

Save

Once the file is uploaded the status will be New.  
Overnight the file will process and either update to Processed or Processed-Errors.

Barcode file type unit files will process overnight and the units will show up in service recording for the next day.

File Name	Category	Date Attached	Size	Staff Name	Agency Name	Status
20191210MySeniorCenter2.watxt	Barcode File	01/29/2020	290.9 KB	Meyers, Julie	PSA 2 - Northwest Regional Council	Processed
20200206MySeniorCenter2.watxt	Barcode File	02/06/2020	421.6 KB	Johnson, Natalee	PSA 2 - Northwest Regional Council	Processed - Errors

IF the status is Processed-Failed - then something about the file structure didn't pass the validations.

IF the status is Processed - then go to Service Recording to review your unit upload counts match your records.

This tool is where the **Legal Assistance (case data)** occurs.

### Agency Electronic File Cabinet

Reports

#### Filter for Attachments

Agency Name:  Date Range: From  To

Category:

Staff ID:

Apply Reset

File Name	Category	Date Attached	Size	Staff Name	Agency Name	Status
Attachment:	Previous	Next				
<input type="button" value="Browse"/>						

Click Browse

Attachment:

Search for your agency's name.

Click Add to search your local computer for the file to upload.

Save

Add Attachment

Agency Name:

Category:

Once the file is uploaded the status will be New.

Overnight the file will process and either update to Processed or Processed-Errors.

Legal file type files will process overnight and the data will display in Legal Assistance Manager the next day.

**Agency Electronic File Cabinet**

Reports ▼

**Filter for Attachments**

Agency Name:  Date Range: From  To

Category:   Staff ID:

[Apply](#) [Reset](#)

File Name	Category	Date Attached	Size	Staff Name	Agency Name	Status
20191210MySeniorCenter2.watxt	Barcode File	01/29/2020	290.9 KB	Meyers, Julie	PSA 2 - Northwest Regional Council	Processed
20200206MySeniorCenter2.watxt	Barcode File	02/06/2020	421.6 KB	Johnson, Natalee	PSA 2 - Northwest Regional Council	Processed - Errors

IF the status is Processed-Failed - then something about the file structure didn't pass the validations.

IF the status is Processed - then go to Legal Assistance to review your case data upload counts match your records.