SECTION 1400

UPLOAD/DOWNLOAD WebFTP

SECTION 1400 INDEX

SECTION 1400: UPLOAD/DOWNLOAD WebFTP

1401: Introduction

This function will only appear on the **Home** page of Family Service - Senior Resource Center. This function allows the provider to upload/download their internal client database information into ClientTracker.

The **Upload/Download WebFTP Files** function is located at the left hand side of the screen below the **Change your password and password reminder.**

On the **Upload/Download WebFTP Files** page, you will see the following:

Upload
Delete
New Folder
Rename
List of Zip files

1402: Upload/Download

1. On the **Home** page, click on the **Upload/Download WebFTP Files** link located on the left side of the screen.

2. The **Upload/Download WebFTP Files** page will appear.

3. In the **Upload/Download WebFTP Files Below** content box, click on the **[Upload** link.

4. The **Upload Files** page will appear.

5. In the **Upload Files Below** content box, click on the **Browse...** button and double click on the correct file to be uploaded. In the **Upload Files Below** content box, the file name you selected will be displayed in the **Select File:** box.

6. Once you selected the upload file, click on the **Save** button.

7. In the **Upload Files Below** content box, the following statement will appear, A**Please wait...**@ in the **Status:** box.

8. Once the file has been saved, the **Upload Complete** page will appear.

9. In the **Uploaded Import Files!** dialogue box, the following statement will appear,

AYour Import file has been unloaded successfully, and was placed in rotation to be imported later this evening. You will receive an email after the import has been completed, which will then direct you to the Exception Report.@

Please remember that when you Upload a file, the import process will not be completed until after 12:00 a.m. that following day. For example, the Import file was uploaded at 3:00 p.m. on Monday. The import will not be completed until 12:00 a.m. Tuesday morning. In order to meet the end of the quarter ClientTracker deadline, the ***Upload/Download*** *import process must be completed 24 hours prior to the due date. For example, 1^{st} quarter*

ClientTracker data must be entered by 4:00 p.m. on January 10th.
*Therefore, the **Upload/Download** process must be completed by 4:00 P.M. on January 9th in order to meet the January 10th deadline.*

1403: Delete

This function will allow you to delete selected files and/or folders. This function should be used very carefully. ***Remember, once you delete a file/folder, it can not be recovered.***

1. On the **Home** page, click on the **Upload/Download WebFTP Files** link located at the left side of the screen.

2. The **Upload/Download WebFTP Files** page will appear.

3. In the **Upload/Download WebFTP Files Below** content box, click in the box next to the file/folder you want to delete.

4. Click on the Ω **Delete** link.

5. A pop up window will appear. It will ask if you are sure you want to complete the delete process.

6. If you are sure you want to delete this file/folder, click on the **OK** button.

1404: New Folder

This function will allow you to create a separate folder(s) to upload/download NAPIS files. For instance, to separate the files into fiscal years, a provider could create a new folder for each fiscal year and direct new uploads/downloads to that particular folder. However, existing uploaded/downloaded files can not be moved into new folders.

1. On the **Home** page, click on the **Upload/Download WebFTP Files** link located at the left side of the screen. *(Attachment A)*

2. The **Upload/Download WebFTP Files** page will appear. *(Attachment A1)*

3. In the **Upload/Download WebFTP Files Below** content box, click on the **New Folder** link.

4. A pop up window will appear. In the designated area type the name of your new folder.

5. Click on the **OK** button.

1405: Rename

This function will allow you to change the name of the selected files and/or folders. It should be used very carefully. Remember, the name of a file indicates the quarter and year for which the file was developed. Changing the name of the file/folder could affect the ability to retrieve the information.

1. On the **Home** page, click on the **Upload/Download WebFTP Files** link located at the left side of the screen.

2. The **Upload/Download WebFTP Files** page will appear.

3. In the **Upload/Download WebFTP Files Below** content box, click in the box next to the file/folder you want to rename.

4. Click on the **Rename** link.

5. A pop up window will appear. In the designated area type the new name of your file/folder.

6. Click on the **OK** button.

1406: List of Zip Files

These are the files that have been uploaded/downloaded each quarter. The name of the file indicates the quarter in which the file was created. Each zip file name consists of two (2) alpha characters and four (4) numeric characters. For example, Family Service's FY 2007 4th quarter upload file name would look like – **AL0709.zip**.

AL – Family Service's assigned alpha characters is AL. The alpha signs were arbitrarily assigned to individual service providers.

07 – Family Service's file was created in calendar year 2007. The two (2) middle numeric characters indicate the calendar year in which the file was created.

09 – Family Service's file was created in the month of September. The last two (2) numeric characters indicate the last month of the quarter in which the file was created.

In order to view the zip files, you will need to save the file to either your computer or disk.

1. On the **Home** page, click on the **Upload/Download WebFTP Files** link located at the left side of the screen.

2. The **Upload/Download WebFTP Files** page will appear.

3. In the **Upload/Download WebFTP Files Below** content box, double click on the zip file you wish to review.

4. A pop up window will appear asking where you would like to save the file. Again, in order to view the zip files, you will need to save the file to either your computer or disk.

1407: Exception Report

Once you have received the email confirming the completion of the import process, you will be directed to the **Exception Report.** The **Exception Report** will list errors that have been determined during the import process. It is important to review the **Exception Report** so that you can correct those errors. However, because the **Exception Report** is a static piece of information, corrections made to client information will not be reflected on the **Exception Report.** To view the **Exception Report**, complete the following steps:

1. On the **Home** page, click on the **Upload/Download WebFTP Files** link located at the left side of the screen.

2. The **Upload/Download WebFTP Files** page will appear.

3. In the **Upload/Download WebFTP Files Below** content box, click on the **ExceptionReport.xml** link.

4. The **Exception Report** page will appear. In the **Choose an Import File** content box, select the most recent Import file by clicking on the file name.

5. The **Exception Report for Import on Aimport date@** content box will appear. The **Exception Report** will:

   $ list clients that have not been imported into ClientTracker and the reason for the error is listed directly below the client's name; and/or,

   $ list clients that have been imported into ClientTracker that have incomplete client demographic information.

*Please note: If **Eligibility** is the only client demographic information missing from the client's file, you do not have to make any corrections to the client's file in ClientTracker. However, if there are any other client demographics that are missing, corrections must be made to the client's file in ClientTracker and in your internal database system.*

6. In order to get a condensed list of the clients that were not successfully imported, click on the **View Condensed List of Clients Not Entered** link located above the **Exception Report**.

7. The **Clients Not Entered into ClientTracker Through Import** page will appear.

8. In order to correct the errors for the clients that were not imported into ClientTracker, you must register the clients individually. *(See **Section 400 - Register Clients.**)*

9. In order to correct the errors for the clients that were imported into ClientTracker with incomplete client demographic information, you must go to the **Client Information** page for each individual client. *(See **Section 900 - Client Information.**)*

10. In order to determine if the unit of service data was uploaded/downloaded correctly, you will need to compare ClientTracker data with Family Service's internal data for each site/service/month for that particular quarter. (See **Section 1500 - ClientTracker Quarterly Procedures**.)