
HOW TO IMPORT DOCUMENTS TO THE FILE CABINET

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Pointers to Remember:

File Cabinet Functionality

The following parameters exist for the FACES.NET file cabinet functionality:

1. Only Word documents can be imported in the file cabinet;
2. Some documents are automatically stored in the file cabinet (i.e. Court Reports and Transfer Summaries).
3. The contents of the file cabinet are stored according to the caseworker who entered those contents – without contextual data. For example, an Administrative Review Notification may be stored in the file cabinet but, we have no way of associating it with an Administrative Review record within FACES.NET.

Steps Include:

Step 1: Hold cursor over the **Admin** drop down menu button, and then **File Cabinet**.

Step 2: Click on **File Cabinet**.

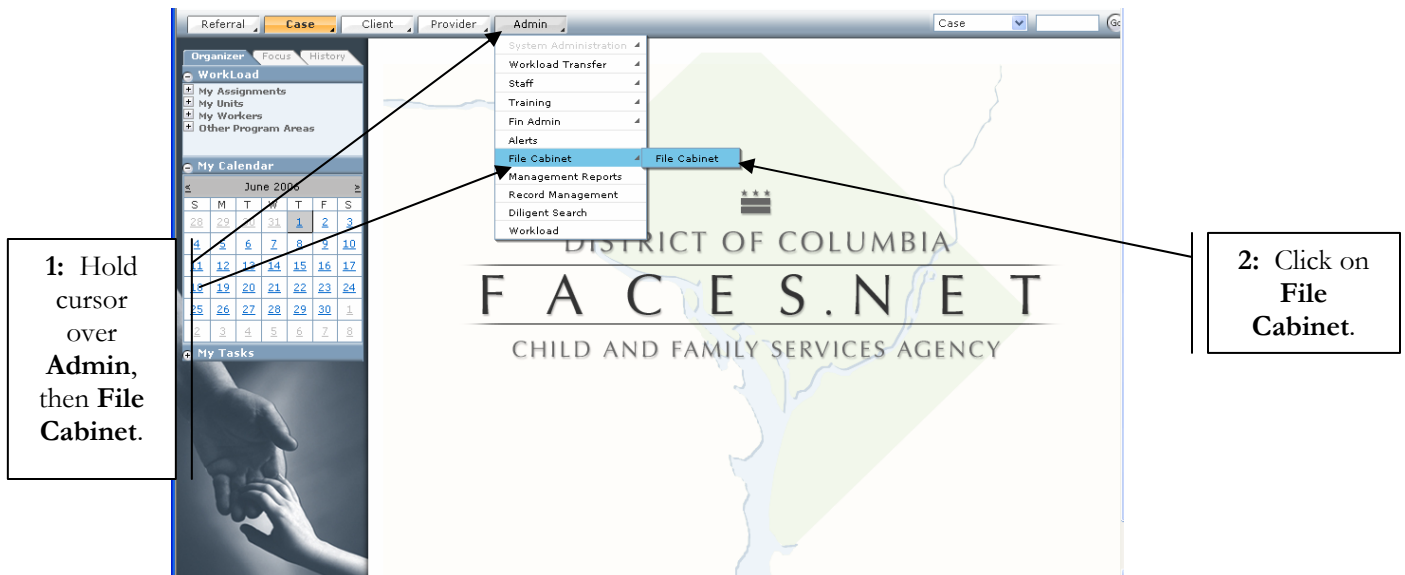


Figure 1



Notes:

- This dialogue box will open after clicking on the second **File Cabinet** button. If the user is working within a case when the **File Cabinet** button is selected then the File Cabinet dialogue box will open with that case in focus. If the user has no case currently in focus then the dialogue box will open containing a list of all cases assigned to the worker.

- The contents of the File Cabinet are dependent upon the screen from which the File Cabinet was opened. For example, within clinical screens, the File Cabinet will open with the current case in focus. Within provider screens, the File Cabinet will open with the current provider in focus.

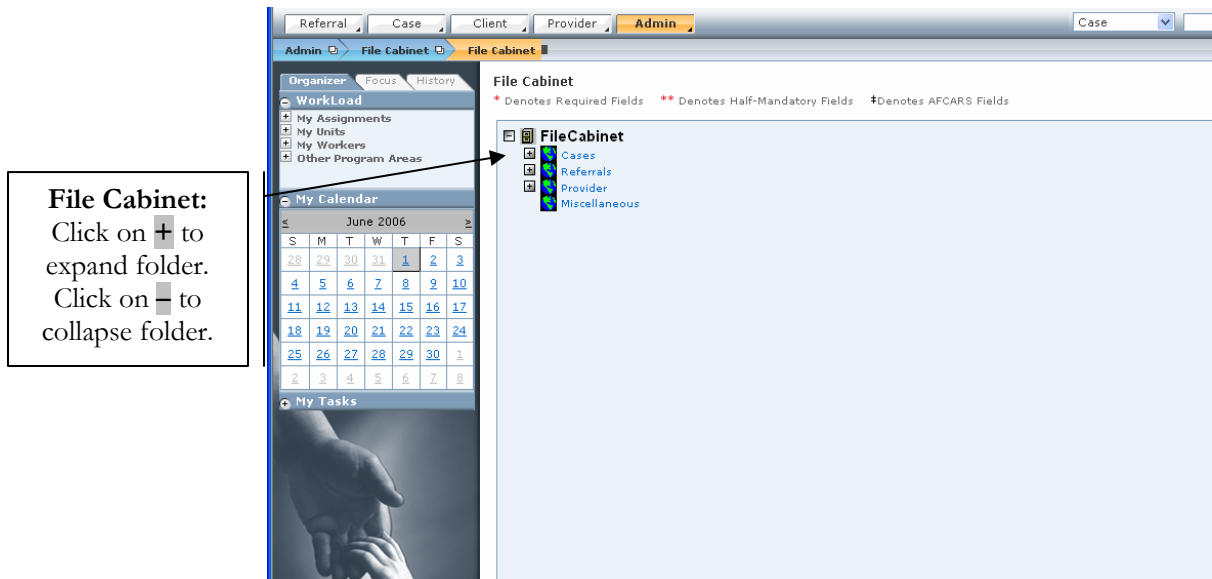


Figure 2

- The Cases folder is expandable to show all clients within the case. Expanding a single client sub-folder yields additional sub-folders. (See Figure 3)

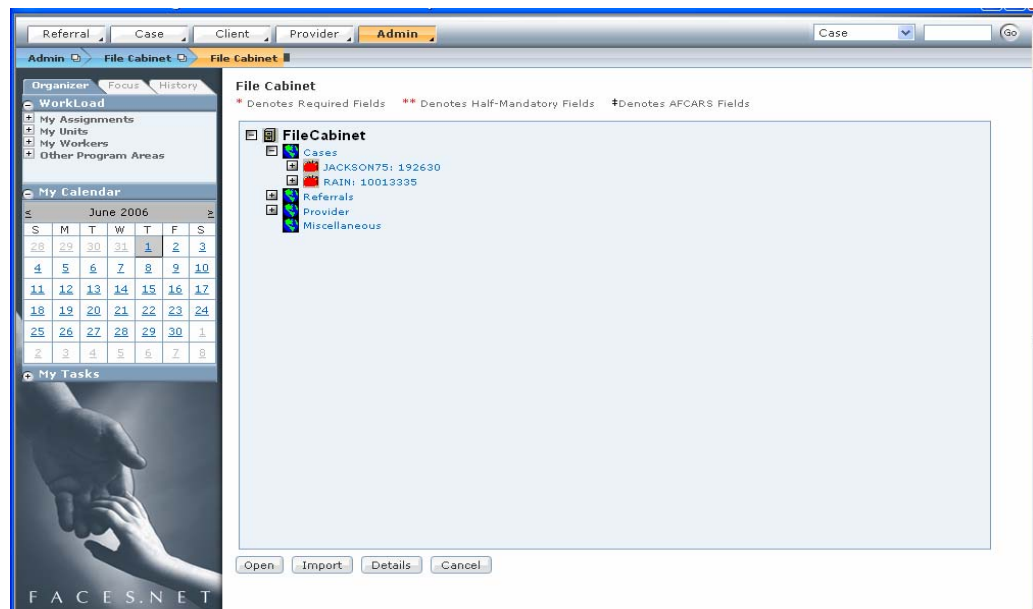


Figure 3

- For case based File Cabinets the following sub-folders will appear. (See **Figure 4**)
- For each document, the tree view entry is composed of a listing according to the document's date and name.

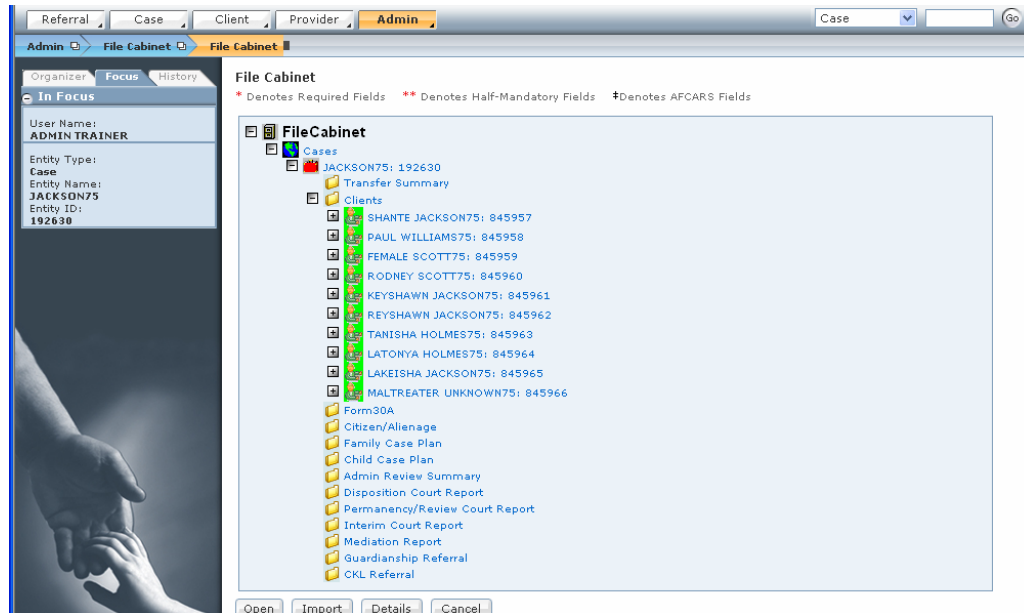


Figure 4

Opening a document in the File Cabinet

Step 1: Highlight the selected item.

Step 2: Click on the **Open** or **Details** button.

Note:



- If the user selects **Open** or **Details** without first selecting a document, the following error message will be shown: "Please select a document in order to view Details."
- Once a document has been selected, the Open button causes that document to be opened using the appropriate application (i.e. Microsoft Word for Word documents). If the PC does not possess an application suitable for opening the document then display the following error message: "No application is available to display this document. Please Contact The Help Desk."

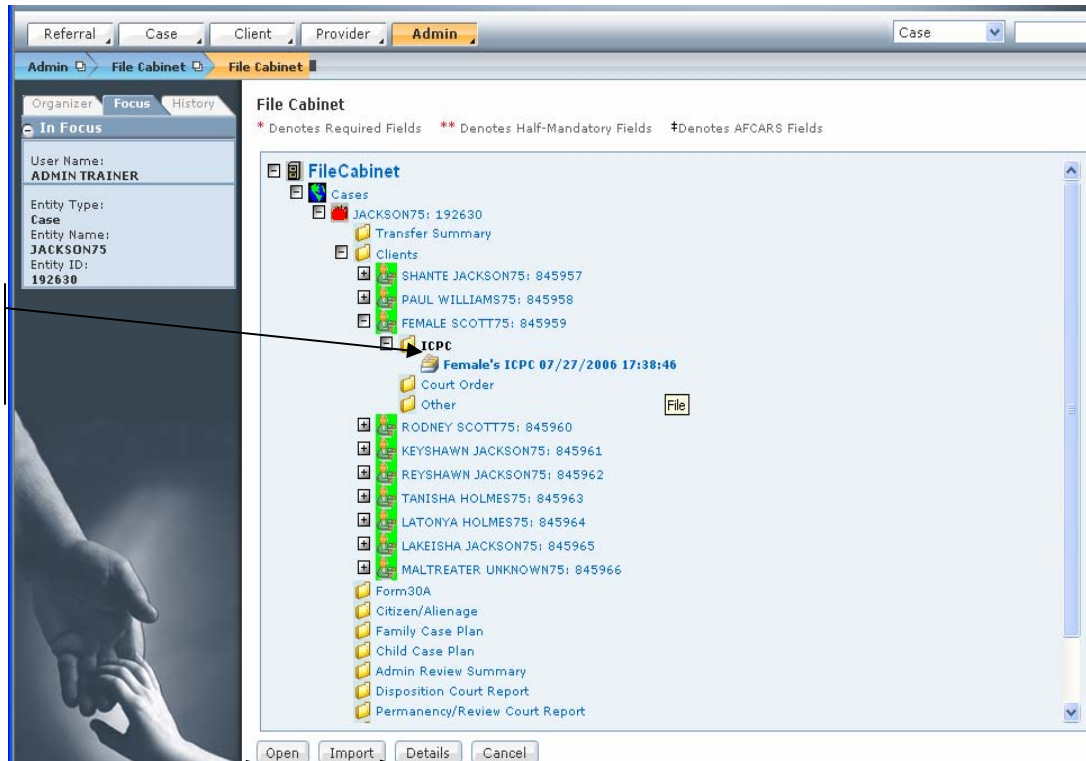


Figure 5

2: Click on
Open or
Details

- Once a document has been selected, the Details button displays the dialogue box shown in Figure 6. Note that the File Cabinet dialogue box remains open while the Document Details box is open.

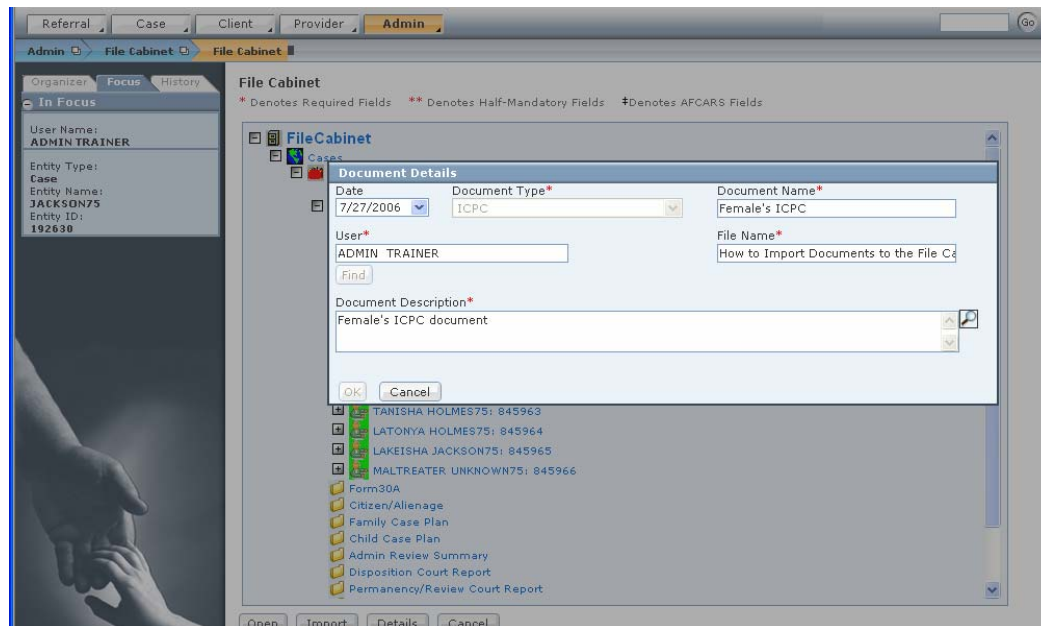


Figure 6

Saving to the File Cabinet

Step 1: Navigate to the **File Cabinet** of the Case by placing your mouse over **Admin**.

Step 2: Place your mouse over **File Cabinet**.

Step 3: Click on **File Cabinet**.

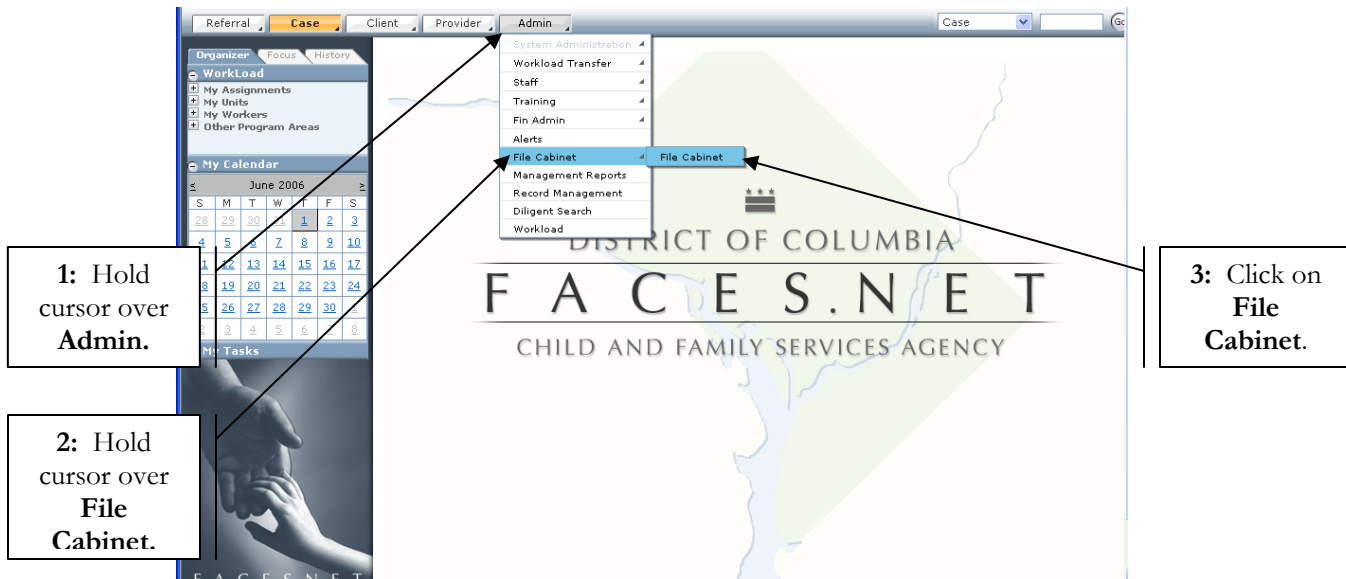


Figure 7

Step 4: Expand the directory tree (by clicking the plus sign, which then turns into minus sign) to the folder of the client whose document needs to be imported (example: ICPC).



Note:

- If the document to be saved is not client specific, then save the document to a general targeted folder.

Step 5: Highlight the folder.

Step 6: Click on **Import** to save it to the file cabinet.

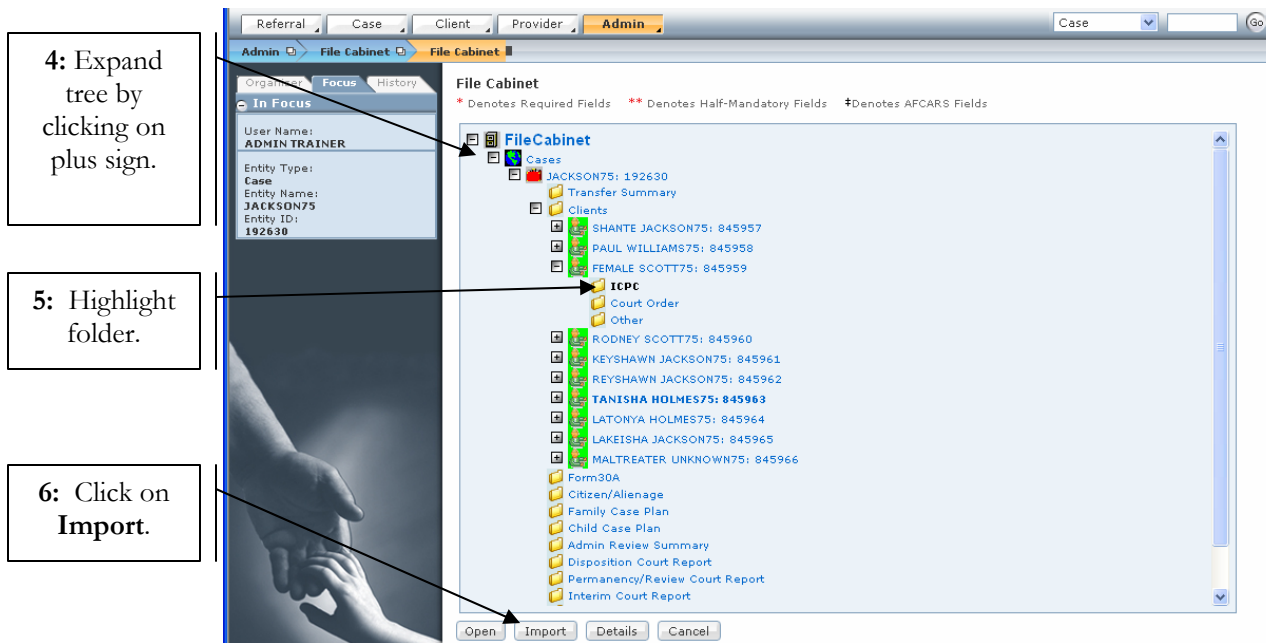


Figure 8

Step 7: Enter the **Document Name***.

Step 8: Attach the file by clicking the **Browse...** button under **File Name***. Find the path to which you saved the ICPC document (i.e.: desktop).

Step 9: Enter a **Document Description***.

Step 10: Click **OK**.

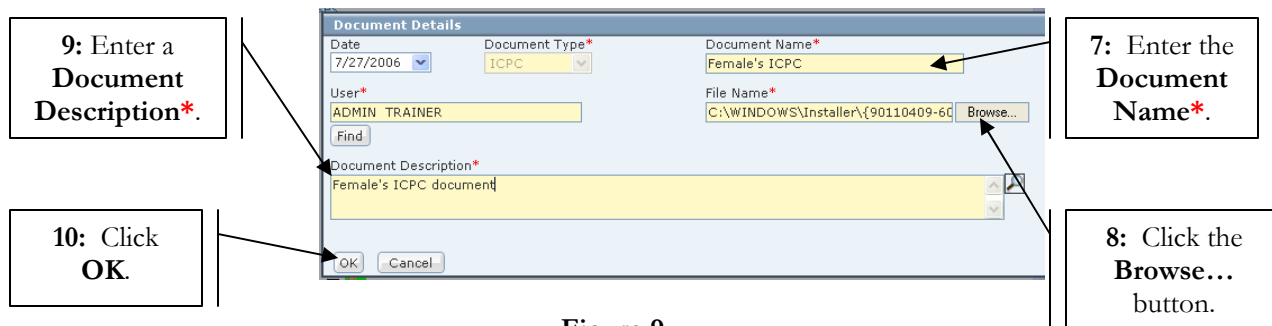


Figure 9



Note:

- The following message should appear, confirming that the document was saved to the file cabinet.

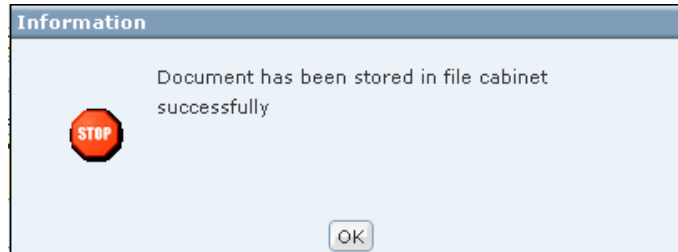


Figure 10



Note:

- The imported document will now appear under the folder for the specified client. Highlighting the document and choosing **Open** will open the document any time in the future.

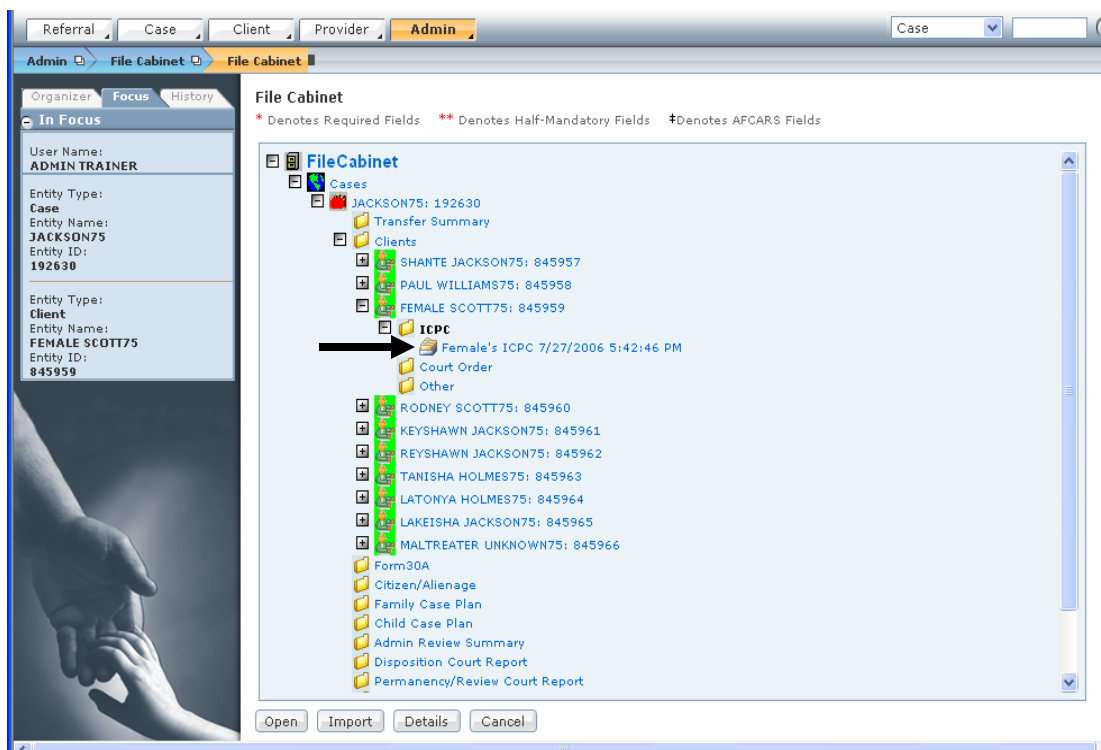


Figure 11