



## Data Exchange – Quick start guide

The Data Exchange is the Community Grants Hub's approach to program performance reporting. It provides flexible ways to submit performance information to the department. In return, the Data Exchange delivers two-way data sharing between funding agencies and organisations in a range of engaging reports.

Follow these steps to access the Data Exchange and reports:



### Access training materials

Task cards and e-Learning modules are available on the Data Exchange website [Training](#) page. These resources help you to get started on the Data Exchange, the different steps in adding data and link you to the required forms. There are also webinars and animations to help you.

The [Data Exchange Protocols](#) is a support manual on how to apply the requirements of the Data Exchange. The Program Specific Guidance provides guidance for each program that uses the Data Exchange.

The [Log into the Data Exchange web-based portal](#) task card will help you to access the Data Exchange web-based portal.



### Create your Digital ID

The DEX Portal uses the Australian Government Digital ID System to verify users. Digital ID is a safe, secure and convenient way to prove who you are online. myID is the Australian Government's Digital ID app.

To access the DEX Portal you will need at least a Basic identity strength.

For information about Digital ID, please visit the [Digital ID website](#).

For information about myID, and for help with set up, please visit the [myID website](#).



### Link your Digital ID to a business through Relationship Authorisation Manager (RAM)

Once you've set up your Digital ID, you will need to link it to a business using RAM. How you link will depend on whether you're a:

- [principal authority](#) - a person responsible for the business. A principal authority needs to link to the business in RAM first before others can be authorised to access government online services like the DEX Portal on behalf of the business. To link the business in RAM as a principal authority, you need a myID with a Standard or Strong identity strength.
- [authorised user or administrator](#) - is someone who acts on behalf of a business. A principal authority or authorisation administrator needs to authorise you before you can access the DEX Portal on behalf of a business. You'll use your myID to log into RAM and accept an authorisation request

## Decide on an upload method

You can choose to upload your data in three different ways; system-to-system, bulk XML upload or manually via the Data Exchange web-based portal.



If your organisation is using system-to-system or bulk XML upload, technical specifications need to be sent to your IT vendor/specialist. [Web services technical specifications](#) (system-to-system transfers) and [Bulk file upload technical specifications](#) provide further information.

A staging environment is available for use by your IT vendor/specialist to test their coding before 'live' data is uploaded. This process can take some time, so do this early. Contact the Data Exchange Helpdesk for more information.

## Request access to the Data Exchange

Once you have your myID, talk to your Organisation Administrator for Data Exchange access.



If your organisation does not have an Organisation Administrator, complete a [User access request form](#) to access the Data Exchange. Once completed, this form is sent to the Data Exchange Helpdesk. We will endeavour to action the form within 10 business days, and send an email confirming the Data Exchange account is ready.

The Data Exchange Organisation Administrator can set up accounts for other users within the organisation including authorising others to be organisation administrators.

## Create outlets and users



Once access to the Data Exchange is granted you can now set up your organisation and create outlets and users.

The [Create and manage outlets](#) task card helps you complete this process.

## Start entering data

Start creating your clients, cases and sessions as they occur within the reporting period. Please note, at least one session must be recorded as occurring within a reporting period for the case and associated clients to be counted in reports.



There are two reporting periods per year which run from 1 July to 31 December and 1 January to 30 June, with a 30 day close off period to allow you to finalise your data. Once the close-off period ends, no further changes can be made to the data.

We recommend you upload your data regularly so you can check its quality and benefit from evaluating your service program.

## Subscribe to keep updated



We recommend you [subscribe](#) to receive important reminders about updates and events on the Data Exchange.

## Funding Arrangement Manager



Contact your Funding Arrangement Manager (FAM) if you have any questions regarding the Data Exchange. Your FAM details are listed in your organisation's grant agreement.

## Quick start checklist

STEP	ACTION	LINK	✓
1	Access training materials	<a href="#">Data Exchange Training resources</a>	<input type="checkbox"/>
2	Create your Digital ID	<a href="#">Digital ID</a>	<input type="checkbox"/>
3	Link your Digital ID to an ABN using Relationship Authorisation Manager (RAM)	<a href="#">Relationship Authorisation Manager</a>	<input type="checkbox"/>
4	Determine your upload method and request Data Exchange Helpdesk access to the sandpit environment	<a href="#">Data Exchange Helpdesk</a>	<input type="checkbox"/>
5	Complete the User access request form	<a href="#">User access request form</a>	<input type="checkbox"/>
6	Provide technical specifications to your IT vendor/specialist	<a href="#">Data Exchange IT Access</a> tab	<input type="checkbox"/>
7	Subscribe to receive regular updates	<a href="#">Subscribe to our mailing list</a>	<input type="checkbox"/>

The Helpdesk is available to provide technical help to users of the Data Exchange.

You can contact the Data Exchange Helpdesk by email at [dssdataexchange.helpdesk@dss.gov.au](mailto:dssdataexchange.helpdesk@dss.gov.au) or on 1800 020 283.