Organisation Administrator Webinar Transcript – 27 August 2018

Good afternoon. Welcome to this information session for data exchange organisation administrators on the data exchange system enhancements that were released in August.

My name is Neil Swan. I'm with the Data Exchange Engagement and Hub Learning team and it's my pleasure to take you through this webinar session today. The presentation should take about 30 minutes and will have some time for some questions afterwards. Joining me today is Brendon from our team and he will be answering any questions that you may have online. We are only able to take written questions at this time, so please bear with us we will try and get you an answer soon as we can.

This webinar is directed towards the organisation administrators in your organisation.

<<*first screen*>>

We will be holding another webinar on Wednesday for data exchange web-based portal users, and you can register for that on our website.

Before we begin, I'd like to acknowledge that we are meeting on many traditional lands around the country today and I want to acknowledge the traditional owners of those lands and pay my respects to the elders past and present.

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Firstly we'll just give you a quick reminder on how to use the webinar portal. Some of you would have previously used this, and would be very familiar with it. Some may be with us for the first time.

Throughout the webinar, the control panel should have appeared on your screen as you can see in the screenshot. You can check that your sound is muted by looking at the microphone icon and it should be red or orange. Muted means you can't ask questions using your voice. You can type your questions in underneath the panel that shows the questions panel and as we have provided a handout you'll find this in the handout section. Group chat is not enabled this time either. If the control panel disappears, it will minimise to just a sidebar.
To expanded again to select the orange arrow at the top.

<< *Next screen*>> Agenda

So, what are we looking at? Today's session will be covering the following items for the data exchange organisation administrators. During the session, we will be viewing the status of program activities, looking at outlet creation, changing user roles within the data exchange, a quick reminder on how to download and use the data reference data files and some other system enhancements.

Once again there will be an opportunity to ask questions during the session so you can type those in at any time and Brendon will be able to answer them for you, as well as at the end of the session when we will keep the session open for about 10 minutes just to try and get through any questions that you may have. The webinar will also be placed on the data exchange website under the webinar library, so keep an eye out for it - it will probably take us a week or two to get that up there for you.

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So, what are the benefits of the enhancements introduced? There were quite a few enhancements introduced this time around. It was a fairly major release and we have hopefully made the DEX portal easier to navigate for you, with the addition of a new search field and other buttons. It allows for greater self-service by you as the organisation administrator and I'll demonstrate that during this webinar. Enhancements will also allow for better flow of functionality and this will be evident as we create new outlets and we are trying to make it easier for you as administrators to use a data exchange.

I'd like to remind everybody that we will be using a training database for this demonstration so the organisation outlet and usernames are all fictitious. You would log into the data exchange as normal.

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OK, hopefully everybody can now see our training portal. So when you login to the portal this is going to be the new screen that you see. So what we're going to do is select under the *my organisation* heading at the bottom of page, we're going to select to manage organisation.

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What we are looking at here is how to check that your program status is still current. We will scroll down to the program activities at the bottom of the page, and a new column called *status* has been added to this page that shows you all of the active and inactive programs that you have been funded to deliver. This list will expand as your organisation delivers more programs or if you cease delivering a program it will become inactive. To make it easier for you to see which program activities are current and which have ended, we've included a status column, and it can be sorted using the up and down arrows to sort the list as required.

At present we do not in our training environment have any inactive programs so it will only show those that are active. Sorry there were a couple that are expired so as to show all the programs. I have just ticked on the tick box the top right of the screen and it now gives us those programs that are expired and those still active. So the default setting will always be only showing you the active programs.

Hopefully this will help you sort through them a lot easier.

The different statuses that are in this system are expired, which means that the program end date has passed, as you can see here on the top line for the problem gambling specialist services, the end date was 30 June 2017.

Active indicates that the program is still current and being reported against and the third option, which is ended by lead. If you are delivering a program activity on behalf of another provider – a delivery partner, and the lead organisation has ended this relationship prior to the activity end date, "Ended by lead" status will show. To revert back to the display active program activities only, untick the "show all box".

The next thing we are going to do is add an outlet for your organisation. At the top of the screen you will first see all of your organisation details, so make sure that you're on the right organisation. If you happen to have a couple of organisations that you manage, it would be worthwhile checking that each time.

To add an outlet we simply click on the add outlet button and this will take us to a new outlet page.

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Just a few things to note for the address field. You will no longer be able to add a post office box address as an outlet. All outlets must have a physical address which will assist in correctly reporting the location. If, however, your outlet is sensitive in nature, such as a women's refuge or for a homeless shelter that address should be the local police station, hospital or even your town library just to make it so that people can't find your outlet readily and quickly to protect your clients.

We will just set up a test outlet. First of all, I will show you what happens if you do put in a PO Box.

As you will see there is also pop-up boxes now that help you put in the details that you are required to put in.

When you start typing Greenway for instance, it will bring up the ACT 2900, and we will go and try and save it. As you can see, it will give you the warning box that you cannot put in a PO Box. So instead we will change that to our physical address, and again you can see it's starting to auto populate. These details record outlets more accurately and help us make sure that you are being mapped into the right location. It is now saying there is already an outlet with this name and locality existing in the database. Because we cannot have multiple outlets with identical names and localities, it is saying I cannot continue.

We will go back to the screen before and will call this one test outlet two. Okay, so now it's given us a warning that says an outlet with this locality already exist. Please check existing outlet. However, we can still create this outlet, even though it is the same address, so will click on continue adding outlet and it always gives you the option of do you really want to go ahead, or do you not.

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Again it is successfully saved but it is actually giving you a warning, to check that you haven't duplicated the outlet. From this screen we can delete the outlet if we think we do not really need two outlets with the same address details created and we can edit the outlet details if we need to change something. Or, we can edit, add the activities that this outlet will deliver.

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Okay, I've just noticed a question came up about the process when a town suburb name is not in the DSS download list. That should not happen. It's a fairly extensive list, I can try and see if I can find one and probably relates more to the places in indigenous communities in the Northern Territory where there may not be an actual geocode for them. We would have to actually have a look at that one if it ever arose. If you like to send the question through to the helpdesk for that question, we'll get an answer for you later.

So, the question was around Norfolk Island outlet; that would probably be because it was not actually under a state previously and now has come under a state. Putting in the Sydney address would be the most appropriate action for that item at that time. Again, if you'd like to send through that information to the helpdesk we can investigate that for you further after the webinar.

I'll stop looking at the questions and let Brendon answer some of those. So, the other question was about setting up outlet yourself. Yes, the new enhancement does actually allow for that to happen. They are still verified, but you can set them up straight up as I'm demonstrating now. What I'm demonstrating to you is the functionality that you now have under the enhancement.

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We are going to add the activity. We have just moved to the activity screen to the program that we want to add. All of your programs that are available you'll see here. Quite an extensive list and we will just go with the assistance with care and housing as this one in the pop-up box. You do not need to change the start and end dates for your activities. If for some reason you change the end date - for instance, back to 30 June 2019, past that date, you won't be able to input data until you fix that up if you're funded past that date. In any future updates for funding in your activity, they won't actually be picked up automatically, so by leaving these fields as they're recorded from your funding agreement will mean that later on down the track, if you continue to get funding in the same program, then it will be automatically updated when your new funding agreements issued.

If you see that these details are incorrect, please speak to your funding agreement manager about that straightaway so that you can get them fixed up. Okay so now we've added that activity and you can see that the status is ready for approval. Once that is approved, you'll be able to then start adding your client sessions and cases to that outlet and that activity for that outlet.

<<Next screen>>

We'll just return back to manage organisation screen. Couple of ways you can do that. Select "I want to" over on the side over here - so these are all options that you can then move onto. You can select up the top in the breadcrumb trail the home or the manage organisation screen, or if you want to just now move on to finding a client you can actually type that in up the top in the search bar or got to find a client. You can also edit your organisation's details if needed.

Okay, a quick question there was about deleting an outlet. We can have a quick look at that now. Sorry, you can't delete an outlet if you have cases associated with an outlet or sessions or clients. So even if you move office, you can edit the details and you do that simply by clicking on the outlet and going to edit details and then you can just change the address details as needed. So if you've moved from your head office, and you moved to Queanbeyan you can go in and simply change that in that field so you don't need to delete an organise an outlet if you've already attached cases and clients to it. If you don't have any clients or cases attached to that outlet, you can go and delete it by using the delete button at the top. It'll be green, and it will then allow you to delete that outlet.

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Next we will have a look at manage users. So again, we have made it easy for the organisations to add, update or delete your users that can access your organisation's data in the data exchange. You are able to create new editor and view only users and you can also create new organisation administrators for your organisation. We do encourage you to have more than one organisation administrator in each organisation in case someone is away or leave, and they need to create a new user or they need to do something in the system to update it.

The way you do that is the same as adding any user and we'll do that now. So click on the add user button and I'll add our new worker. Each one must have a valid email address and this email address is the same as that was attached to their AUSKey credentials. It's really important that the two match up, because if it doesn't, they won't be able to have this access. Okay, so we then decide do we want them to have…. Now you'll notice there are only two options here – view only and editor. That's because we have to do a few other steps, but it's effectively the same process. So we'll make this person an organisation editor and then you'll see down the bottom is two tick boxes, so by selecting continue, you've informed the user of the conditions of access outlined above and you certify that they need access to the data exchange, that a user details are correct and that they are authorised to access this information on your behalf.

It says the email address is invalid because I am trying to use a department email. It's a fairly intuitive system as well, so now we successfully added Robin Hidd. He/she has not been assigned to outlets and/or activities yet, but this is where if you need them to have access to grant admin access, this is where you would grant that access for them. So in this case we are not going to add them as another grant admin access at this time in the training environment. We will add them to an outlet and we'll just add them to the Canberra city outlet which is just called an outlet which is not probably a great name. They will be a travelling person so we'll give them Brisbane as well. Then we'll attach the selected outlets and down the bottom of the page, you'll see which ones we've selected and there's still the rest of our outlets up the top if you've forgotten to add them to one. So these are the outlets they're now attached to.

<<Next Screen>>

You can also delete outlets from a user so that if we have set something up incorrectly, or they've moved outlets, you might not want them accessing information at their old outlet so you can actually take them off. Again, to change program activities that they deliver from those outlets - select *assist with care and housing* and attach the program and if we forget any, we can add those in now, or we can remove them if we've added the wrong one.

We have had a question about filtering the outlets you can sort the outlets by name and here you'll see there are four pages. There is no way to actually run a search on those outlets unfortunately at that screen you have to click across the bottom to find the appropriate outlet that you need. Hopefully that won't be too many extra keystrokes for you.

So that's adding and editing a user details. You can edit user details at the top, we can also delete a user if need be.

You can do that straight from this screen because we are already in Robin Hidd's screen. However, if we want to find different user to delete, is go to manage users hyperlink on the right and now I'm going to pick this user training one there. So, Woody Harrelson, Woody @movie.com. Okay, we can see that Woody has left out department, he's done his little bit of community work with us to get involved in a role he's going to be performing on stage somewhere, so we're going to delete Woody from the system. It's quite a simple process – select delete user – *do you really want to delete this user account?* Select Yes. So Woody can no longer log into our system and therefore no longer see clients or client data. So it's really easy to do that function.

Sessions aren't actually attached to a user, in terms of nothing happens to the sessions, clients or case data that they may have been input. It's just they won't be able to access that information anymore through the data exchange because they won't have access to the data exchange. It is important to make sure you don't delete the wrong person because that would make it difficult for them and you'd have to go and re-establish them. None of their data disappears, the data all sits in the portal for you. It's just that they cannot actually access the portal anymore. Thanks for that question.

Just had a question about changing a phone number in the user details. So again - edit user details - change details as required and select save. It is really easy to navigate around and most of the details that you can actually change quite easily.

The only one we would be very wary of is changing someone's email address given that it is linked to their AUSKey, so be very wary about changing that. Also, what you can see right at the bottom we have system role and you can change it between editor and view only in that box. So remember too if you're going to add them as an organisation administrator, this is done on the front page. The organisation administrator role allows a user to recreate and manage outlets and administer user access within your organisation. It's the highest level of access, and it will grant access to all outlets and program activities within your organisation so it should only be for people who are administrating access to the portal and what your staff can see. I'm just going to go 'yes', now it has saved successfully. John Fredrickson has access to all information and if you decide you want to change that, the only way you can change them is to remove administrator access. So, sorry John - wrong person I've given access to, so I'm just going to remove it. He's back to being an organisation editor which you can see here.

Previously, if you wanted them to be an organisation administrator, you would have had to send through a form. Now you can do it straight from the self-service area in the data exchange portal.

Another question has just come through about accessing the 'my DEX' reports - all users can access the 'my DEX' reports even in read-only. If you've only got read-only access, you can still view the reports. They are attached to the reports your staff can see, are normally only attached where the outlet is that they're working from that you've given them access to in the bottom of the screen and to the activity program activities that they're actually delivering. That limits them to certain information, if you don't want them to see the whole organisation. As an organisation administrator you have full view of everything that's been input into the data portal.

We'll go back to the homepage. Were there any other questions, just whilst we've got a couple of minutes?

It looks like I'm already over my half an hour, so just a quick reminder on the reference data files. To get to the reference data, we simply select under the 'my organisation' tab, the reference data hyperlink. It is the third one down and here we'll find the reference data, the latest reference file and the latest file XML schema that is valid for bulk uploads. We encourage you, of course, to regularly go to this section and download the current version of the reference data and send it to your IT vendor if necessary for them to update their software as well. It is updated on a regular basis. As you can see, I have selected ‘Download reference data ‘ and then I will open it or save it as required to get it to the software vendor.

So, those are the major changes that we have made to the data exchange portal for system administrators. As you can see, we’ve made it easier for you to manage your staff, your outlets and the programs that your organisation provides.

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The other system enhancements we will show in more in-depth on Wednesdays web portal user webinar. If you’re not using the web portal directly, if you’re using a system to system or bulk upload system this won’t apply.

You’ll notice that we’ve changed the look of the dashboard. So now we have this find area so three things you can find; a client, a case and an outcome score for a client.

You can also, on the right-hand side select to add client, case, session and score and hopefully our icons now will match up so client looks like client, case looks like case all the time and sessions are the same and scores are the same.

You can also use the search bar up top to find a client name, case ID or a session ID. Here you can see I have started typing in the name John and here you can see all of the Johns we’ve set up in the database as clients.

If we type in a number, such as 0009, this shows you that we’ve got cases start with that number. If we type in 00 you can see it’s again active in the way it searches for information.

So here we can see that the green is a session so it can help you find information quite readily so these are sessions. Probably the easiest way to find clients is, we found a client and a case has starts with the CLI so if you have an unidentified client with Client ID, all you do is type in 1955 and there’s Elwood Blues. Then his client details will come up. This client is still identifiable because he gave consent for his information to be identifiable. If you only have client ID, you can type clients right to he will see clients aren’t identified 1911and 1907. These clients have not given consents of their names, and we also have a case that starts with 1921, so that we can actually see that there is a case with a similar name. We would hope that that would not be attached to a client with the same name as we recommend that client identification is not included in the case name. Again it just takes us straight to clients that have say an unidentified client that the name is hidden. Their DOB is there, but you shouldn’t see any other details for them at that time. You’ll still see, of course the sessions and the cases that they’ve been attached to.

So we have just got another question about outlets and program activities that are expiring on 31 December 2018, as I said before the expiry date of those actually comes from your funding agreement. So if you’re only funded up to 31 December ,that will be what’s in your outlet and in the program activity details. If you have an extension pass that date, please speak to your funding agreement manager and they should be able to get some help for you on that. It may be that where a new program name has been provided and we have to link the two together, hopefully being done in the background, so that should fix itself up closer to the 31st December. You can still put all your data in up to 31st December of course, or up to 30 January 2019 with 30 days after the close period against those activities.

I’m now going to mute myself. We will leave the presentation open for another 10 minutes. If you do need further help, of course you can go to data exchange website where all the training resources are. There is information on the self-serve reports that you will be able to have a look through. We are not covering reporting in this session at this time. We can add that down the track. This information session was just about use of the data exchange for organisation administrators.

You can find webinars under the find training tab on the website. So thank you for your time today. I’m sorry for running 15 minutes over, but if you’ve got any further questions we’ll be here for another ten minutes. Thank you!