Australian Government Department of Social Services



# Overview of the My Organisation section

## Task card

This task card discusses the following:

- Access to 'My Organisation'
- Manage organisation
- Manage users
- <u>Reference data</u>
- Uploaded files
- Manage action items

## **KEY HIGHLIGHTS**

- All functions under the My Organisation section are accessible to the organisation's Data Exchange Organisation Administrator.
- The Reference data and Uploaded file sections are only relevant for those organisations that perform bulk file uploads into the Data Exchange.

## Access to My Organisation

Access to the **My Organisation** section of the Data Exchange can be located on the home page. Refer Figure 1.

Figure 1- The Data Exchange home page



There are five links in the My Organisation section that a Data Exchange Org Administrator can select.

- 1. Manage organisation
- 2. Manage users
- 3. Reference data
- 4. Uploaded files
- 5. Manage action items

## Manage organisation

Select Manage organisation under the My Organisation heading. Refer Figure 2.

Figure 2 - Manage organisation link



The **Manage organisation** screen will display detailing the following information to Data Exchange Organisation Administrators. Refer Figure 3:

- 1. Edit organisation details button
- 2. Organisation details section
- 3. Outlets listing
- 4. Add outlet button
- 5. Pagination function
- 6. Program activities listing
- 7. Notifications area

Figure 3 - Manage organisation screen

10	Australian Government	Data Exch	ange	You are logged in to Community Organisation
	Go to Q. F	nd – Client Name/Id, Case Id,	Session Id	
	Hitter - Manage segmentation Manage organisation		DIT ORGANISATION DE TAILS	I WANT TO
2	Organisation Details Prefered organisation name: Community Orga Pathership Approach agreement: No ABN: 11223344556 Source Organisation name: Community Orga Source Organisation name: Community Orga			Add a case Add a session Manage organisation Manage users Reference data Uploaded files Go to home page
3	Outer name 0 Address T Andress 71 Andress GREENWARY A Process 1	gram activity:	+ ADD OUTLET SEARCH CHAR Created Date 17 64873245 4 5	4
6	Program activities (10) Program activity © Statemen CenterL Services	5tart date () End date () 61/07/2017 2006/2021	Show Alt	7
	Commental Transiti Connelling and Transiti Constitity     Comments and Store Showed     Tamita Chancels Resolution     Tamita Law Consenting     Tamita Law Consenting     Tamita Law Consenting     Tamita Law Consenting	e1.07/2017 30/06/2021     e1.07/2017 30/06/2021     e1.07/2017 30/06/2021     e1.07/2017 30/06/2021     e1.07/2017 30/06/2021     e1.07/2017 30/06/2021	Active Ac	
	Extension Automatic Sensor     E.C., Individual Casacity Building     Intension Entry Sensori Sensions	01072017 30/062021 01/07/2017 30/062021 01/07/2017 30/062021	Active Active Active	

Table 1 - Field descriptions for the Manage organisations screen (Refer Figure 3)

FIELD	DESCRIPTION
Edit Organisation Details	Select this button if you need to update your organisations details, including preferred name and participation in the partnership approach. Refer to the <u>Create and manage outlets</u> task card for more information.
Organisation Details	This area displays a general overview of your organisation including your preferred name, source name, ABN and source Identifier.
Outlets	This area lists all outlets associated with your organisation. If you are a first time user, no outlets will be listed. You will need to add your outlets.
Add Outlet	Select this button if you need to add an outlet. For instructions on how to add an outlet, please access the <u>Create</u> and manage outlets task card.
Pagination function	Should your organisation have multiple outlets and/or program activities, the information will automatically paginate. Use the numbered pages or <b>Next</b> button to move through the pagination function.
Program activities	This area lists all program activities that your organisation has been funded to deliver, and to be reported against in the Data Exchange.
Notifications area	This area will display a bell icon to advise that a handshake request has been issued / received. This area is for Lead and Delivery organisations. Refer to the <u>Handshake – Create, accept or revoke</u> task card for more information.

## Manage Users

Select Manage users under the My Organisation heading. Refer Figure 4.

Figure 4 – Manage users link



#### The Manage users screen will display. Refer Figure 5.



Table 2 - Field descriptions for the Manage users screen (Refer Figure 5)

FIELD	DESCRIPTION
Search	Search for existing users. This is especially useful for organisations that have large numbers of users.
Results	This area will display a list of already registered existing users within your organisation. Click on the blue 'expand row' arrow to display the user's access type.
Add User	Select this button if you need to add a new user. Refer to the <u>Add and edit a user</u> task card for instructions on how to add a new user.

## **Reference Data**

The Reference data section is for those organisations that perform bulk uploads into the Data Exchange. Files that contain all the Data Exchange codes can be downloaded through **Reference data**.

Select Reference data under the My Organisation heading. Refer Figure 6.



### The Reference data screen will display. Refer Figure 7.

From this screen, you can download the XML schema, Reference data, and Organisation Activity data. We recommend these files be downloaded at least every three months to ensure you have access to the most recent reference data.

#### Figure 7 - Reference data screen

Australian Government Department of Social Services	Data Exchange	You are logged in to Logout
G	o to Q Find – Client Name/Id, Case Id, Session Id	
Home > Reference data		I WANT TO
Reference data         The latest reference data items can be downloaded         File upload XML schema         This file contains the XML schema that is used to the Download XML schema         Download XML schema         Price data         This file contains the client, case, session and asses Download reference data	l	Find a client Find a case View a client SCORE Add a client Add a case Add a session Add a client SCORE Manage organisation Manage users Reference data Uploaded files Go to home page
Organisation activity and This file contains the Activity and outlets program a Download Organisation data		

## **Uploaded files**

The **Uploaded files** section is **only** for those organisations that perform bulk uploads into the Data Exchange. Select **Uploaded files** under the **My organisation** heading. Refer Figure 8.

Figure 8 - Uploaded files link



The Uploaded files screen will display. Refer Figure 9.

Figure 9 - Uploaded files screen				
Australian Government Department of Social Services	Data	a Exchange	0Zetland Lo	You are logged in to cal Community Support
	Go to Q Find – Client Name	e/Id, Case Id, Session Id		
Home > Uploaded files Uploaded files All fields marked with an asterisk (*) are require Created from: * 10/05 Files (3)	sk (*) are required.		UPLOAD NEW FILE	I WANT TO Find a client Find a case View a client SCORE Add a client Add a case Add a case Add a session Add a client SCORE Manage organisation Manage users
Flies (3)			Show 10 V GO	Reference data Uploaded files Go to home page
File 🗘	Uploaded on 🗇	Uploaded by 🗘	Status 🗇	
SESSION (full).xml	5/06/2020 10:19:13 AM	BL_ZQ262034@blue.local	Successful	
ALL (basic).xml	13/11/2019 2:45:23 PM	BL_ZQ262034@blue.local	Successful 🕕 ┥	
ALL (basic).xml	12/11/2019 8:59:09 AM	BL_ZQ262034@blue.local	Successful 🕠 📢	

Table 3 - Field descriptions for the Uploaded files screen (Refer Figure 9)

FIELD	DESCRIPTION
Upload new file	Select this button to upload an XML file containing bulk client, case and session data.
Search	Search for files that have previously been uploaded. Use the calendar function to enter the dates.
	This section will display the files that have been located using the Search functionality on this page.
Files	Click on the blue 'expand row' arrow to display additional comments about the upload file. Click on the file name hyperlink to view details about the files contents and upload status.

## Manage action items

Select Manage action items under the My Organisation heading. Refer Figure 10.

Figure 10 – Manage action items link



The **Manage action items** section will alert an organisation if a handshake request has been received and requires actioning. Refer Figure 11.

Figure 11 – Manage action items link Home > Manage organisation Manage organisation EDIT ORGANISATION DETAILS Organisation Details Preferred organisation name: Busy Bee Community Centre Partnership Approach agreement: Yes ABN: 44110687262 Source Organisation ID: 4-147S5B Source Organisation name: Busy Bee Community Centre ADD OUTLET Outlets (1) Address State Program activity: SEARCH Clear ~  $\sim$ Outlet name 🗘 Address Created Date 🔿 Busy Bee Community Centre 49 Upton Street MONA SH ACT 2904 12/06/2014 • Program activities (11) Program activity ۞ Notification 🗘 Start date 🗘 End date 🗘 12/06/2014 Sommunities for Children - Facilitating Partners 12/06/2015 • Children's Contact Services (for Community Care ) 01/07/2014 30/06/2019 4 Communities for Children - Facilitating Partners (for Canberra Life Skills) 01/07/2014 30/06/2017 • • Communities for Children - Facilitating Partners (for Church Group) 01/07/2014 30/06/2015 Communities for Children - Facilitating Partners (for Community Care.) 01/07/2014 30/06/2016 4 Family and Relationship Services (for Community Care.) 01/07/2014 • 30/06/2020 Family Law Counselling (for Canberra Life Skills) 04/06/2014 04/06/2015 4 01/07/2014 4 Family Relationship Advice Line (for Community Care.) 30/06/2017 Forced Adoptions Support Services (for Community Care ) 01/07/2014 30/06/2019 4 

More information on handshakes can be found in the Handshake - Create, accept or revoke task card.

You can find more information on outlets, clients, cases, and sessions on the <u>Data Exchange Protocols</u> and the <u>Training</u> page.

For system support, contact the Data Exchange Helpdesk by email dssdataexchange.helpdesk@dss.gov.au or on 1800 020 283.