Australian Government

Australian Institute of Health and Welfare

Specialist Homelessness Services
Validata™
Manual

Homelessness:

clearer picture,

better future

Contents

1. Introduction

1.1 Overview

Validata^{TM} is a secure web portal that enables the secure submission of data to the Specialist Homelessness Services (SHS) Collection at the AIHW.

Validata^{TM} generates a report about the data extract's interaction with the SHS Collection edit rules that control the quality of the input data. Validation results can then be downloaded by agencies and used to identify potential data errors, which can then be amended prior to re-uploading and submitting the extract.

Validata^{TM} is trademarked to the AIHW.

1.2 SHED

The details of agencies participating in the SHS Collection are found in the Specialist Homelessness Establishment Database (SHED) file. The SHED is maintained by the AIHW and provides information about the government funded agencies providing services to people who are homeless or at risk of homelessness. The SHED defines the scope of the SHS Collection and provides the AIHW with other details such as the location of the agencies and contact information that is needed to administer the SHS Collection.

The AIHW refers to nominated agency contacts in the SHED to authorise the creation of new Validata™ user accounts.

1.3 Validata™ security measures

Validata™ has many measures in place to ensure the security of the data submitted to the SHS Collection. The data is de-identified (it does not contain client names or addresses) and the AIHW is legally mandated to protect both the privacy and the security of the data it holds. For more information, see <http://www.aihw.gov.au/privacy-of-data/>.

Users of Validata™ are carefully monitored. Users have a unique user ID, unique email address, and must maintain a personal password. They can only access information about the organisations for which they have been assigned a role by their organisation's manager ('User Admin').

1.4 Compatible web browsers

It is important to upgrade web browsers on a regular basis to improve performance and update security features. The Validata™ system is compatible with Internet Explorer version

11 (IE11) and above, and the latest stable versions of Chrome and Firefox. Older IE versions may encounter rendering or compatibility issues. If necessary, contact your organisation's IT administrator to request a browser upgrade.

The example below shows the message generated by Validata™ when an outdated browser version is detected.

Validata has detected that you are using (**IE 7**). Although Validata was built to be used with some older web browser versions, this particular browser is out of date. Validata has been designed to be used with the following browsers and versions:

- Internet Explorer version 11+
- Chrome version 1+
- Edge version 11+
- Mozilla version 2+
- Opera version 9+
- Firefox version 2+

Please use a newer browser.

Although you can still use Validata, some functionality may not work as expected. Click the agree link if you acknowledge this.

I Agree

1.5 Validata™ search options

Validata™ search options are available on all tabs and are accessed by selecting the 'magnifying glass' icon at the head of each column. See an example of search icons below:

Org name	Org ID	Parent ID	Org type	Status
Q	Q	Q	Q	Q

Three main search options are available:

1. 'Contains/Starts with'

This search option is available in the majority of columns and enables the user to select either 'Starts with' or 'Contains' and enter the relevant search criteria.

2. 'Equals'

This search option is available on selected columns and enables the user to search by parameters such as 'Equal to', Greater than' and 'Less than'.

3. Search by date

This search option is available on the 'Upload' and 'Reports' tabs and enables the user to search for the most recently uploaded extracts or reports, or search for those loaded on a particular date.

1.6 AIHW support

Assistance with any Validata™ queries is available by contacting the AIHW SHSC Hotline.

AIHW SHSC Hotline:
- Email: <homelessness@aihw.gov.au>
- Phone: 1800 627 191 (option 2)
- Open 9.00 am to 5.00 pm weekdays (AEST/AEDT)

2 Accessing Validata™

2.1   Logging in to Validata™

A valid username and password is required to access Validata™.

Most organisations will have managers with 'User Admin' access to enable them to create user accounts for other staff members. See Section 3.2 for instructions on how to set up user accounts. If no agency users have 'User Admin' access, contact AIHW SHSC Hotline for assistance to create a user account.
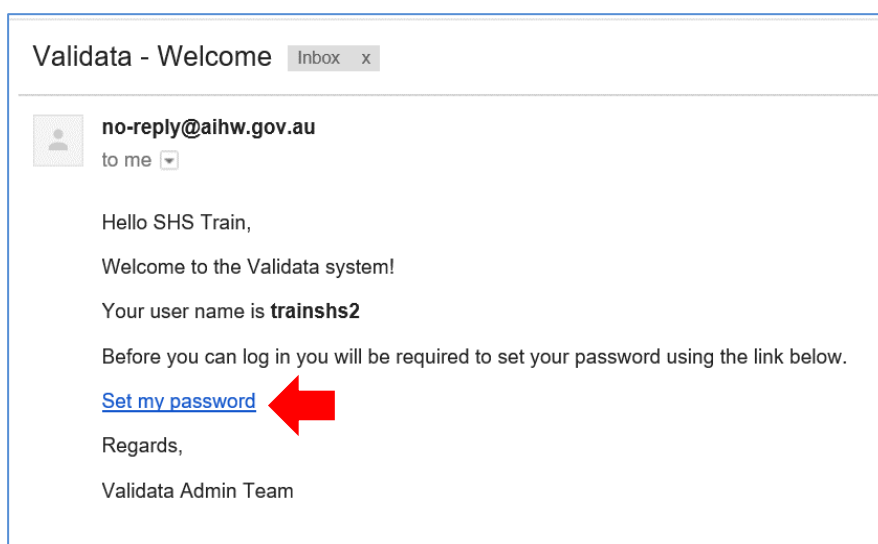
The flowchart below shows the steps required to access the SHS Collection on Validata™:
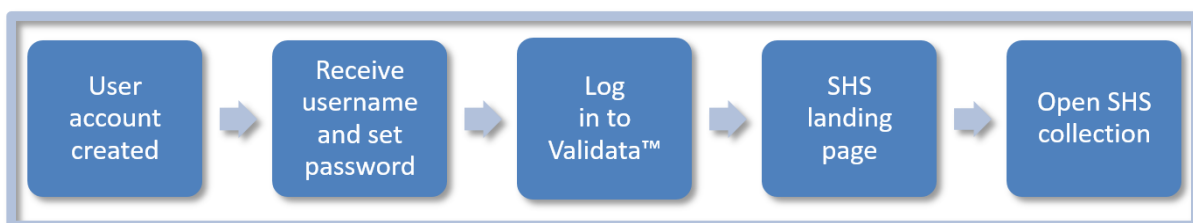
2.1.1   Initial login

When an initial Validata™ user account is set up, a welcome email will be sent with the username and a link to set the password.

1.   Select the 'Set my password' link.

> ⚠️ The 'Set my password' link can only be used once. If you forget your password on a subsequent login attempt, go directly to the Validata™ login page and select the 'Forgot password' link. See Section 2.1.2.

2.   Enter a password, confirm and select 'Set my password'.

Ensure that the password is a minimum of 10 characters and contains at least 3 of the following:

- Uppercase letter
- Lowercase letter
- Number
- Special character (e.g. #,$,&).

Welcome to Validata!

Welcome to the Validata system. Before you can log in for the first time you need to set your password. You'll use this password, along with the username from the welcome email to sign-in to Validata.

Your password will need to be a minimum of **10** characters with at least three of the following:

- Uppercase letter
- Lowercase letter
- Number
- Special character(e.g. #,$,&)

Please set your password now.

Password	••••••••••
Confirm	••••••••••

Set my password

A message will confirm that the password has been set. An email will also be sent to the user.

3.   Follow the 'Log in' link to log in to Validata™.

Welcome to Validata!

Thanks for setting your password! You're now ready to log in to Validata for the first time.

Log in

4.	Enter Username and Password and select 'Logon'.

Conditions of use will appear only once, at the first login. Users must agree to the Conditions of use to be granted access to Validata™. By agreeing, users acknowledge the importance of maintaining the security of their login credentials and that their usage will be monitored.

5.	Select 'I agree to the conditions of use' button to continue.

2.1.2 Forgotten password

If a Validata™ password is forgotten, follow the process described below.

1. On the Validata™ login page, select the 'Forgot password?' link.
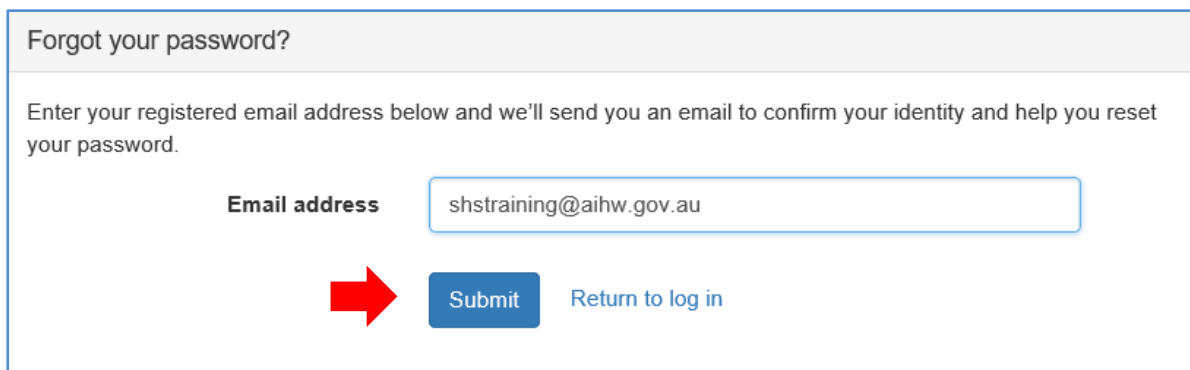
2. Enter the email address that was registered for use with the Validata™ account and select 'Submit'.

 If you cannot remember the email address that was used to set up your Validata™ account, contact the person at your agency with Validata™ 'User Admin' access.

3. An email containing instructions on how to reset the Validata™ password will be sent to the registered email address.

4. Follow the protocols outlined in the 'Reset password' box to ensure the password meets the criteria to create a new Validata™ password.

Reset password

Your password will need to be a minimum of **10** characters with at least three of the following:

- Uppercase letter
- Lowercase letter
- Number
- Special character(e.g. #,$,&)

Please set your password now.

5. After entering and confirming the new password, select 'Submit' to reset the password.

Users will be prompted to update their password every 90 days. Passwords can also be updated in the user profile, which can be accessed by selecting your username in the top right corner of the page (see Section 2.5).

2.1.3 Forgotten username

Usernames are system generated and cannot be modified.

If a username is forgotten, follow the process described below.

1. On the Validata™ login page, select the 'Forgot username?' link.

2. Type in the email address that was registered for use with the Validata™ account in the space provided and select 'Submit'.

3. An email containing the Validata™ username will be sent to the registered email address. The email also contains a link to the Validata™ login page.

2.2 Validata™ home page

Users will be taken to the Validata™ home page when they first log in.

1. Select 'Open Collection' to enter the SHS Collection.

	Some jurisdictional users will have access to more than one data collection. If so, these data collections will appear on this page.

2.3 SHS landing page

The SHS landing page provides background information and important news about the SHS Collection.

It is important to check the 'News' section as this provides up-to-date information about collection cut-off dates, when Validata™ is ready to receive extracts, release of quarterly statistical summaries and upcoming maintenance and system outages.

1. Select 'Open Collection' (4) to open the Specialist Homelessness Services Collection.

2.3.1 Overview of SHS landing page

OVERVIEW

1 **Current collection period:** Displays the most current collection period that is ready to receive SHSC submissions.

2 **Collection description:** Provides background information about the collection and Validata™.

3 **News:** Includes important information, such as collection due dates and maintenance and system outages.

4 **Open Collection:** Select to open the SHS collection and gain access to Validata™ functions such as 'Upload' and 'User Admin'.

Welcome **SHS Train**   Upload queue   Help   Log out

VALIDATA

SHS

4 Open Collection

1 Current collection period: 2018 May

2 Collection Description

3 News

Specialist Homelessness Services collection

The Specialist Homelessness Services (SHS) collection obtains information about people, adults and children, who seek assistance from specialist homelessness agencies. Homelessness data for the SHS collection is submitted through a secure Australian Institute of Health and Welfare (AIHW) online platform called Validata™, which accepts and processes data from SHS agencies across the country. These agencies collect data through a variety of client management systems, including Specialist Homelessness Information Platform (SHIP) and report data to AIHW monthly via Validata™. Validata™ performs a number of validation checks on submitted data, which ensures high quality reporting for the collection.

9 mth Statistical Summary Reports - Now Available!

Ready to receive May 2018 extracts

ACT Public Holiday - Monday 28 May

1 week to go! Final call for 2017 data extracts

2.4 The SHS page

The work performed in Validata™ is determined by the roles that have been assigned to a user. Users may not see all the tabs described below.

The 'Upload' tab is displayed below. This tab is in grey font to identify that this tab is currently displayed.

> The tab names below correspond to user roles. For access to additional tabs contact your agency manager with the 'User Admin' role.

2.4.1 Overview of SHS page

1 **Upload:** Upload agency extracts to Validata™. Submit extracts after identifying and fixing extract errors.

2 **Summary:** Access summary information about agencies and the status of their submissions.

3 **Reports:** View and download SHS statistical summary reports.

4 **User Admin:** Allows users with this role to manage the permissions of other Validata™ users in their organisation.

5 **Collection Help:** Provides a link to access the SHS Validata™ manual and other helpful SHS Collection training resources.

Welcome **SHS Train**   Upload queue   Help   Log out

SHS_Training / Upload

SHS_Training

1 Upload   **2** Summary   **3** Reports   **4** User Admin   **5** Collection Help

Upload data file

Collection period   2018 May

File   No file selected   Browse   Upload

Allowed file types: .csv, .dat, .txt, .xml, .zip

Organisation activity   Please select an organisation...

Collection period: **2018 May**.

⟳ Submit   ✚ Expand all   ⟳ Refresh grid   ⬧ Clear filter

2.5 Menu ribbon

The Menu ribbon is located in the top right hand corner of the screen and consists of the following 4 options:

① Welcome [Username]

1. Select the Username to view your profile and all of the roles associated with your account.
2. Select 'Edit my details' to update your contact details, select 'Save'.
3. If required, select 'Change my password' to change your password.

Data Collection N... ↑	Organisation Abbrev...	Organisation Name	Role	Status
SHS_Training	99910K	SHS Training Crisis Acc...	User Admin	Active
SHS_Training	99910K	SHS Training Crisis Acc...	Upload	Active
SHS_Training	99910K	SHS Training Crisis Acc...	Summary	Active
SHS_Training	99910K	SHS Training Crisis Acc...	Report	Active
SHS_Training	99912G	SHS Training Youth Su...	User Admin	Active
SHS_Training	99912G	SHS Training Youth Su...	Upload	Active
SHS_Training	99912G	SHS Training Youth Su...	Summary	Active
SHS_Training	99912G	SHS Training Youth Su...	Report	Active

4. If required, update your contact details, noting that an additional step is required after saving your updated email address.

Take care when updating your email address as this is a 2 stage process:

- Update email address and select 'Save' – Validata™ will check that the email address is available for use.
- If the email address is available, select 'Save' once more – the email address is updated in the database.

② Upload queue

Provides a record of the status of an agency extract as it is being uploaded to Validata™.

③ Help

Validata™ is used by a range of data collections managed by the AIHW and this Help Page provides generic information about Validata™. For more detailed information about the SHS Collection use the 'Collection Help' tab on the SHS Page.

④ Log out

It is important to log out after using Validata™. As an additional security measure, Validata™ will automatically log users out after 30 minutes of inactivity.

1. Select 'Log out' to securely leave Validata™ and return to the login page.
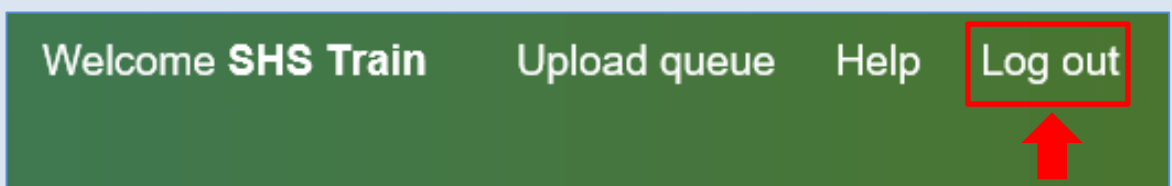
3 User Admin

3.1   User Admin roles and responsibilities

The 'User Admin' role is responsible for managing access to Validata™ for staff at their organisation. The flowchart below gives an outline of this role:

User Admin with access to multiple agencies → User Admin decides who needs access → Create user accounts → Allocate relevant roles → Deactivate roles not required
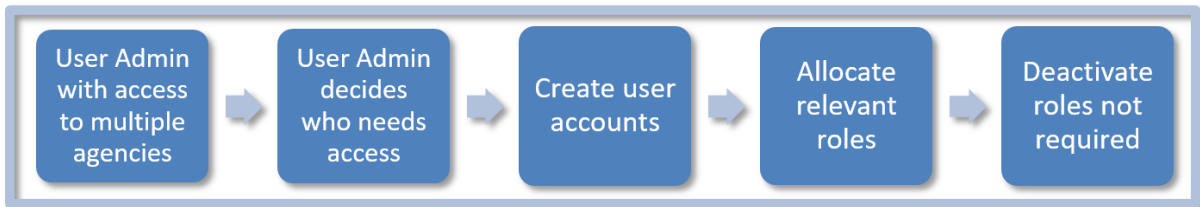
3.1.1   User Admin functions

- Creating new Validata™ user accounts for agency staff.
- Allocating user roles to agency staff accounts.
- Deactivating (removing) Validata™ access for staff who have left your organisation.

3.1.2   Provision of initial User Admin access

The initial 'User Admin' role for a SHS agency is set up by the AIHW. When a new agency is created, the AIHW will grant access to the agency manager nominated in the SHED, who can then create required roles for staff at their agency. 'User Admin' usernames and login details are provided via secure email.

If the 'User Admin' has not been granted access to all agencies under their responsibility, contact the AIHW SHSC Hotline to advise that additional agencies are needed. Approval will be sought from the relevant jurisdiction.

> Everyone who accesses Validata™ should have their own user account.
> Do not allow agency staff to share accounts.

3.1.3 Overview of User Admin tab

(1) Add user button: Select this to add a new user to Validata™, enter new user details and assign agencies and Validata™ roles.

(2) Validata™ user table: Shows the name, contact details and user account status (active/inactive) of Validata™ users.

(3) View button: Select 'View' to see more user details and edit user access permissions to agencies and user roles.

(4) Refresh grid: Select 'Refresh grid' to update the Validata™ user administration table after edits have been applied to Validata™ users.

(5) Filter by organisation: Conduct a search of the Validata™ database to retrieve the details of users belonging to a specific agency

(6) Search function: Search the Validata™ user table for user information corresponding with the table column headings

(7) Clear filter: Removes previous search results and resets the Validata™ user table.

(8) Download user roles: Download a list of users, their contact details and their associated roles.

SHS_Training / User Admin

SHS_Training

| Upload | Summary | Reports | User Admin | Collection Help |

User administration

(1) + Add user   **(4) ↻ Refresh grid**   **(7) ◆ Clear filter**

> ⓘ Providing upload access to a user will allow them to view any data files uploaded for the organisaton/collection. Ensure that you closely monitor and manage user access to your collection.

Filter by organisation **(5)**

First name	Last name ↑	Username	Email address	Phone number	Status	
🔍	🔍	🔍 **(6)**	🔍	🔍	Active ▾	
Peter	Brown	brownpet	peter.brown@gm…	1800627191	Active	View **(3)**
Mary	Jones	jonesmar **(2)**	mary.jones@gmai…	1800627191	Active	View
John	Smith	smithjoh	john.smith@gmai…	1800627191	Active	View
SHS	Train	trainshs	shstraining@gmai…	1800627191	Active	View

(8) Download user roles

3.1.4 Deciding staff access requirements

When creating Validata™ user accounts, it is important to note that not all users will require access to all roles and functions. Refer to the table below when deciding the type of access staff will require.

3.1.5 Validata™ roles and functions

Role Name	Functions
Upload	• Upload SHS agency extracts. • View extract validation status i.e. failed, validated submitted. • Client alpha code details to correct critical errors. • View and download validation results. • Submit valid extracts with no critical errors to the AIHW.
Summary	View and export summary information about associated SHS agencies: • Number of valid extracts submitted for a specific organisation. • Number of extracts with critical errors. • Number of extracts that have failed to undergo the validation process and/or are outstanding. • National submission rate (%). • SHS agency ID and legal entity responsible for the SHS agency (Parent company). • SHED agency manager contact details for each organisation.
Reports	• View and export SHS Statistical Summaries created from submitted SHS agency extracts.
User Admin	• Add new Validata™ users and assign user roles and functions. • Monitor all active and inactive user roles. • Deactivate roles for users who have left an organisation. • View list of organisation users, and their roles and status.

> ⚠ The Summary tab only provides a summary of the submission status of loaded extracts.
>
> To view details of critical errors and affected client records, users will require access to the 'Upload' role.
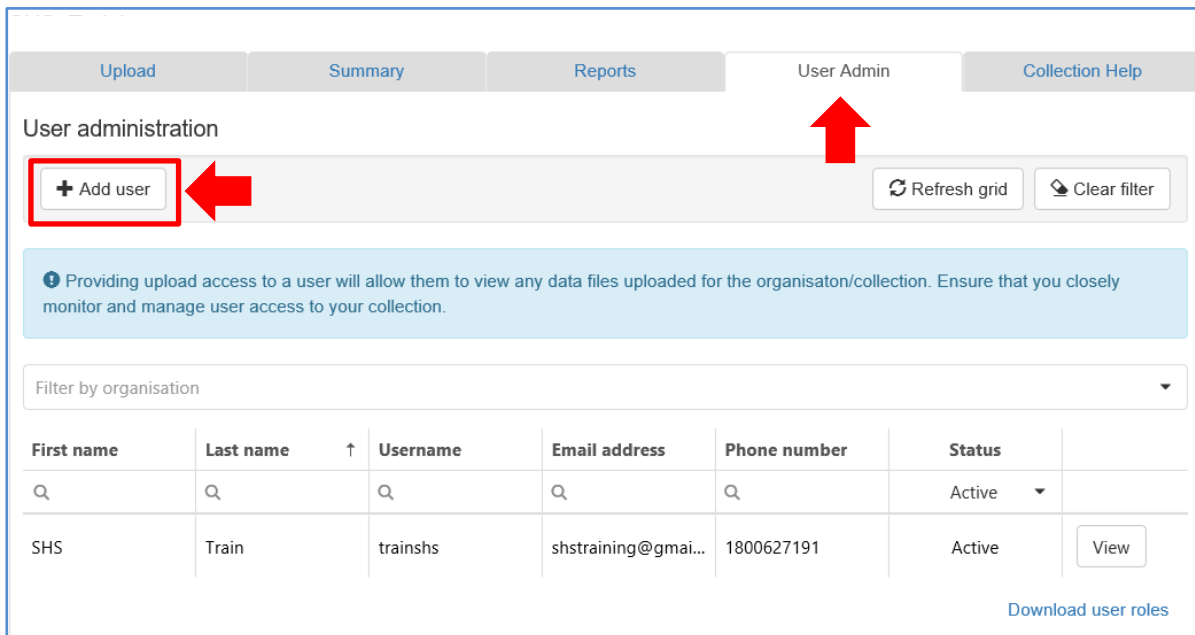
3.2   Creating new user accounts

Users with a 'User Admin' role can create accounts for staff and assign relevant roles and functions. A 'User Admin' can only grant access to agencies and assign roles to users, for agencies which they already have the 'User Admin' access for.
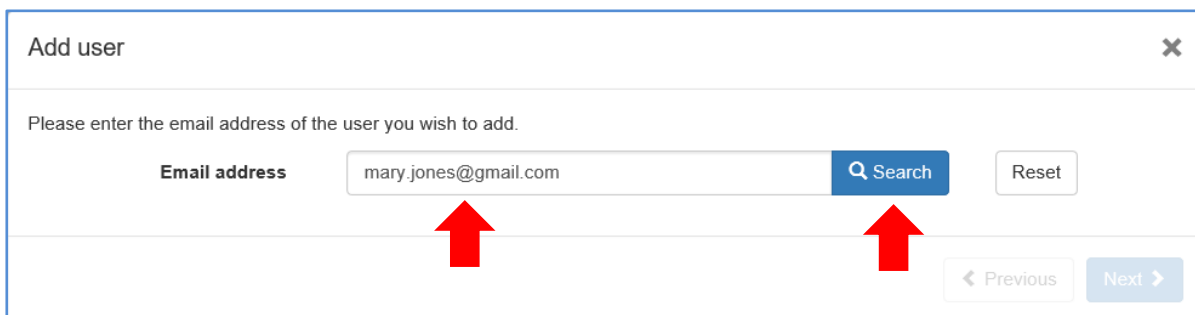
To add a new user to Validata™:

1. Select the 'User Admin' tab.
2. Note the warning to closely monitor and manage user access to the 'Upload' tab.
3. Select 'Add user'.

Upload	Summary	Reports	User Admin	Collection Help

User administration

+ Add user   ⟲ Refresh grid   ⬙ Clear filter

ⓘ Providing upload access to a user will allow them to view any data files uploaded for the organisaton/collection. Ensure that you closely monitor and manage user access to your collection.

Filter by organisation

First name	Last name ↑	Username	Email address	Phone number	Status	
🔍	🔍	🔍	🔍	🔍	Active ▾	
SHS	Train	trainshs	shstraining@gmai...	1800627191	Active	View

Download user roles

4. Enter the email address for the new user.
5. Select 'Search'.

Add user   ✕

Please enter the email address of the user you wish to add.

Email address   mary.jones@gmail.com   🔍 Search   Reset

❮ Previous   Next ❯

⚠️ Ensure that the email address is entered correctly. Once created, the new user is the only person who can edit their email address and personal details.

If the incorrect email address has been entered, deactivate all associated roles and start again by adding a new user. If required, contact the AIHW to request that the redundant email address be deleted.

ⓘ All Validata™ users must have a unique email address. Either create another unique email account for the new user or reuse the required email address from a deactivated user account. See Section 3.6 on how to reuse an email address.

6. Complete the person's details in the relevant fields and select 'Next'.

Add user	✕

Please enter the email address of the user you wish to add.

| **Email address** | mary.jones@gmail.com | 🔍 Search | Reset |

ℹ Please complete the details below and then select next. All fields below are mandatory.

First name	Mary
Last name	Jones
Email address	mary.jones@gmail.com
Phone number	1800627191

‹ Pre   **Next ›**

ℹ Entering a current phone number will enable the AIHW SHSC Hotline to contact users to provide assistance.
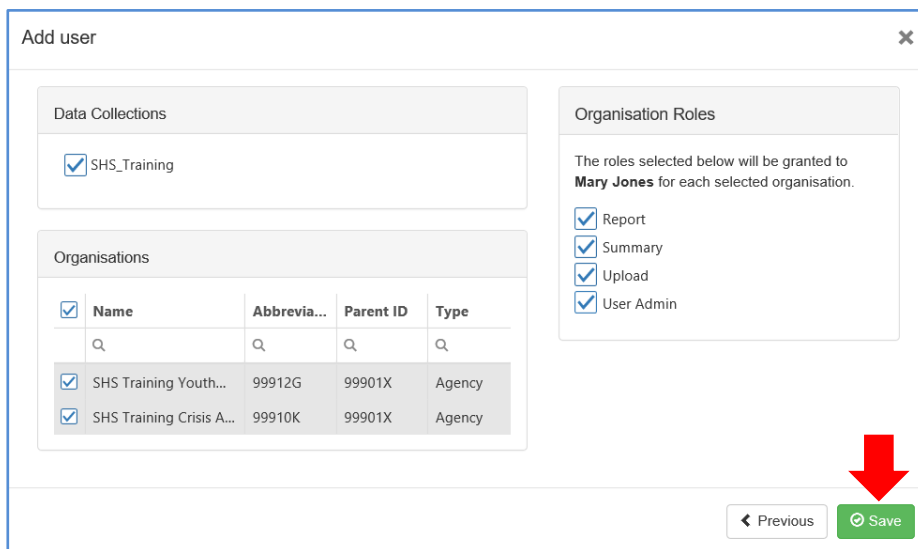
3.3 Adding relevant user roles

3.3.1 Granting access to all roles across multiple agencies

Scenario a): In the example below, the new user will be providing a backup role for the 'User Admin' at agencies 'SHS Training Youth Support' and 'SHS Training Crisis Accommodation'. The new user will have access to all roles at both agencies.

To add all agencies and roles and functions:

1. In 'Organisations', select all agencies the user will require access for.

2. Select all roles under 'Organisation Roles'.

3. Select 'Save'.

3.3.2 Granting limited access to agencies and roles

Scenario b): In this example, the new user only works for 'SHS Training Crisis Accommodation'. This worker will only be responsible for managing submissions and accessing reports for 'SHS Training Crisis Accommodation'.

1. Select 'SHS Training Crisis Accommodation' only

2. Select all roles except 'User Admin'.

3. Select 'Save'.

3.3.3 Providing different roles in different agencies

Scenario c): Some workers may require different roles for different agencies. In this example, the new user is responsible for 'Report', 'Summary' and 'Upload' functions for 'SHS Training Youth Support', and provides a backup role to upload extracts for 'SHS Training Crisis Accommodation'.

Access is not granted to 'User Admin' functions.

1. To add a new user, see Section 3.2 Creating new user accounts.

2. Select 'Next' to add user roles.
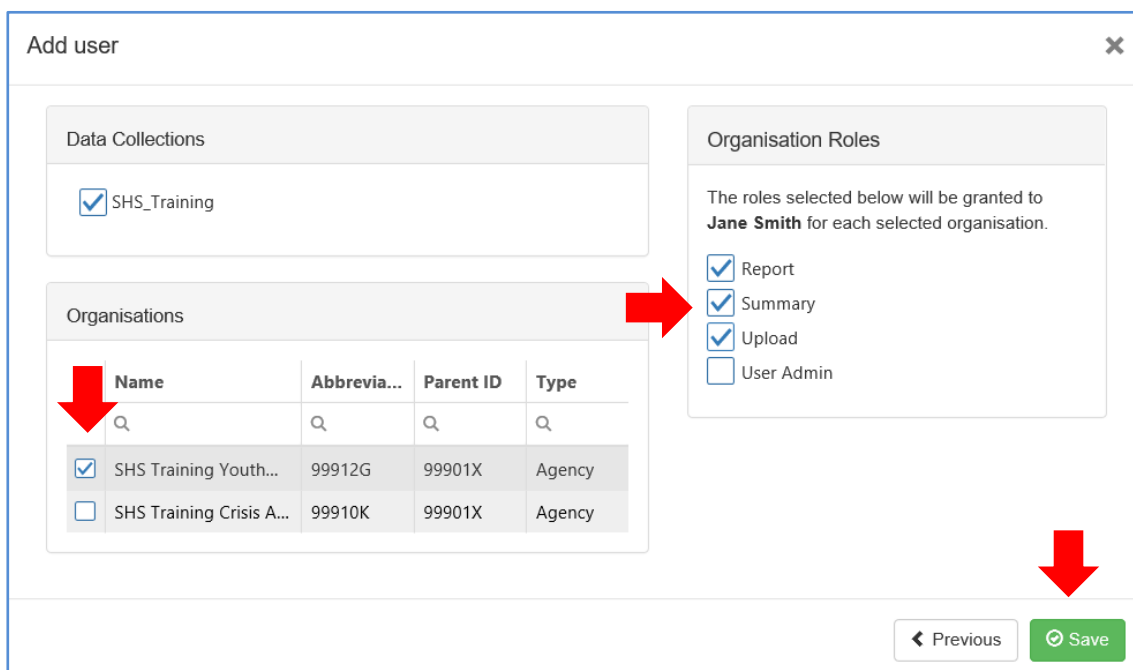
Add user	✕

Please enter the email address of the user you wish to add.

Email address	jane.smith@gmail.com	🔍 Search	Reset

ℹ Please complete the details below and then select next. All fields below are mandatory.

First name	Jane
Last name	Smith
Email address	jane.smith@gmail.com
Phone number	1800627191

‹ Previous   Next ›

3. Select 'SHS Training Youth Support' and the relevant roles required.

4. Select 'Save'.

Add user	✕

Data Collections

☑ SHS_Training

Organisation Roles

The roles selected below will be granted to **Jane Smith** for each selected organisation.

☑ Report
☑ Summary
☑ Upload
☐ User Admin

Organisations

Name	Abbrevia...	Parent ID	Type
🔍	🔍	🔍	🔍
☑ SHS Training Youth...	99912G	99901X	Agency
☐ SHS Training Crisis A...	99910K	99901X	Agency

‹ Previous   ⊘ Save

All users for the organisation are now listed on the 'User Admin' tab.

To add a different role for the user at another agency:

5. Select 'View' to open the user's record.

All current roles of the user are displayed.

6. Select 'Add roles'.

7. As in the scenario above, select 'SHS Training Crisis Accommodation' agency, and allocate the 'Upload' role, and select 'Save'.

Repeat the steps above until all users have been assigned their relevant agencies and roles. A user cannot upload an extract for an agency which is not in their account with an associated 'Upload' role.

3.4 Deactivating user roles

If a user ceases to work at an organisation it is important to maintain the security of the system by revoking their access. A user's roles can be removed at any time without affecting their access to roles at other agencies where they may still be working.

In Validata™, user roles can only be deactivated, not deleted. Deactivated usernames will still appear in the list of users.

To deactivate (remove) agency roles:

1. Go to the Validata™ User Admin table.
2. Search for the user whose access is to be removed – in this example, Peter Brown has left your organisation.
3. Select 'View' next to the user record.

4. Select the checkbox under 'Roles' to select all roles, or select organisations to be removed from access.

5. Select 'Deactivate' or the ⊘ icon to deactivate selected roles.

6. Select 'Yes' to confirm the deactivation.

3.5 Reactivating user roles

To reactivate user roles:

1. Go to 'User Admin' tab.
2. Search for the user (e.g. enter name or email address in search fields)
3. Select 'View'.
4. Select the roles to be restored (in this example, 'Upload' roles at both agencies).
5. Select 'Reactivate' or the 'tick' icon ⊘ to reactivate selected roles.

Sort the 'Status' column by 'Active' to display all of the active roles.

3.5.1 Deactivating user accounts

The AIHW conducts regular user account reviews and will deactivate Validata™ user accounts which no longer have any roles associated with them. 'User Admin' users cannot deactivate a user account, only deactivate roles associated with a user.

3.6 Reusing an email address

It is possible to reuse an email address if the existing user account has been deactivated by the AIHW. The following message will be displayed when adding an email address which had previously been in use.

The message explains that the email is currently allocated to an inactive user. The account can be reactivated for the original user or the email address can be assigned to a new user by updating the user details fields.

1. Create the new account as for any other user.

For instances where a new user takes over an existing email address, the user who previously held the email address will be permanently deactivated.
A new account will need to be created for that user should they require access to Validata™ in the future.

4 Upload

4.1 Introduction to Upload

Agency staff will require 'Upload' access for all of the agencies for which they intend to submit data to Validata™. See Chapter 3 for more information on how to add agencies and roles for a user.
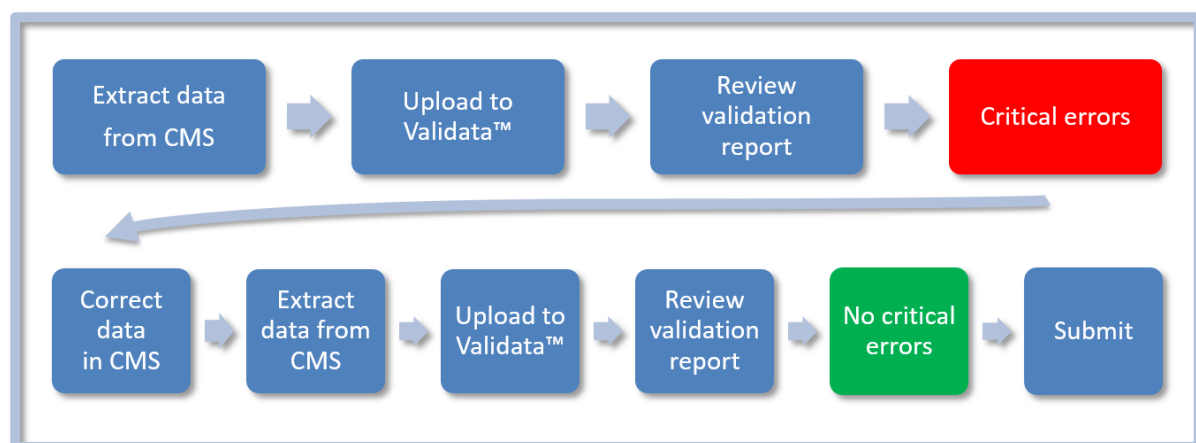
The flowcharts below illustrate the steps required to submit a SHS extract to the AIHW. The steps will vary depending on whether the extract contains critical errors.

Occasionally an extract will fail to load due to other issues encountered during the upload process. This is covered in Section 4.7.

Extract with no critical errors

Extract with critical errors

4.1.1 Overview of Upload tab

(1) **Collection period:** Defaults to the most current collection period that is available for uploads.

(2) **Browse:** Searches for the extract to upload to Validata™.

(3) **Upload:** Imports the extract into Validata™.

(4) **Organisation activity table:** Provides the details and status of extracts uploaded to Validata™.

(5) **Refresh Grid:** Refreshes the 'Organisation activity' table to view an extract recently imported into Validata™.

(6) **Search function:** Search the 'Organisation activity' table for upload information corresponding with the table column headings.

(7) **Actions:** Provides additional information about the extract including critical errors. Select the 'Actions' button to access the 'Submit' button required to submit an extract with no critical errors to the SHS Collection.

OVERVIEW

Train - SHS_Training / Upload

SHS_Training

| Upload | Summary | Reports | User Admin | Collection Help |

Upload data file

(1) Collection period — 2018 April ▾

File — No file sel **(2)** Browse **(3)** Upload

Allowed file types: .csv, .dat, .txt, .xml, .zip

(4) ### Organisation activity   Please select an organisation... ▾

Collection period: **2018 April.**

Submit   + Expand **(5)** ⟳ Refresh grid   ◇ Clear filter

Organisation Name ↑

	Submi...	File name	Upl... ↓	Uploaded by	Crit ...	Status	Details
(6) 🔍	🔍	🔍	🔍 📅	🔍	🔍	🔍	
▾ **SHS Training Crisis Accommodation Service**							
☐	502639	shs_extract_99910K...	03/07/...	SHS Train	0	Validat...	Actions **(7)**

The following sections cover all the steps required to load and submit a SHS extract that does not contain any errors – see flowchart below. How to check for and resolve critical errors will be covered in Section 4.4 and Section 4.5.

4.2 Uploading an extract

Some organisations will have more than one agency and some users will have responsibility for uploading extracts for multiple agencies. Extracts for large organisations can be uploaded in a zip file, but most extracts are loaded individually in '.xml' format.

In the following example, the user has been assigned 'Upload' function for 'SHS Training Crisis Accommodation Service'.

An extract file for 'SHS Training Crisis Accommodation Service' for the collection month of April 2018 will be loaded, validated and submitted.

4.2.1 Extract data from CMS

1. Ensure all client and unassisted person records are up to date for the collection month and generate an extract.

4.2.2 Collection period

2. Select the collection period corresponding with the month of the extract to be uploaded.
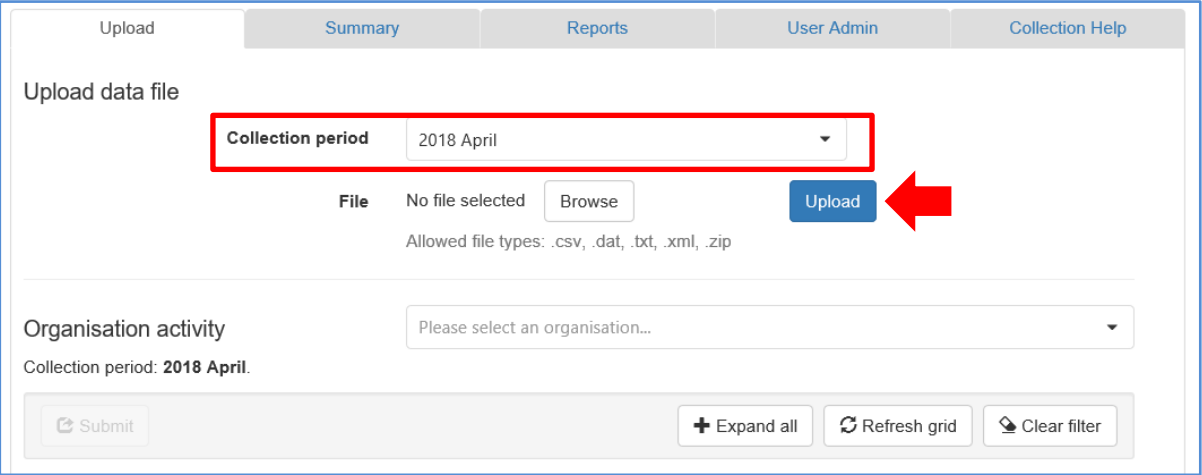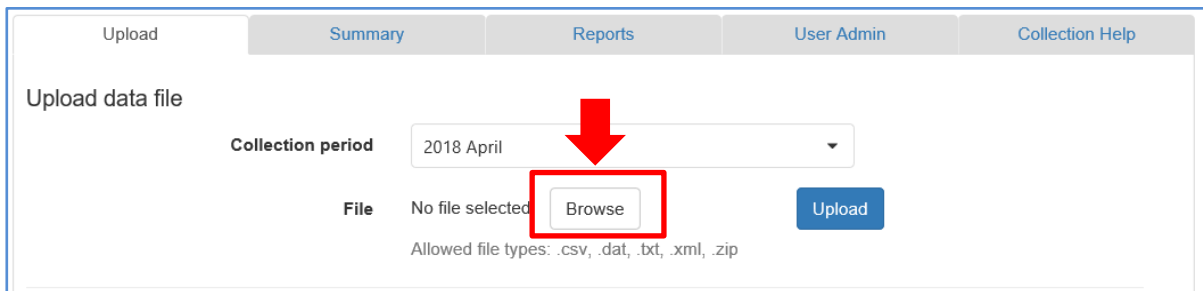
⚠️ You can only upload extracts for agencies that appear in your Validata™ user account (Profile). Should you require access to an 'Upload' role for an agency that does not appear in your user account, contact your agency manager, who has 'User Admin' access.

4.2.3 Import the SHS agency extract into Validata™

3.   Select 'Browse' to search for the agency extract to be uploaded.

4.   Select 'Open' in the import window to select the extract file.
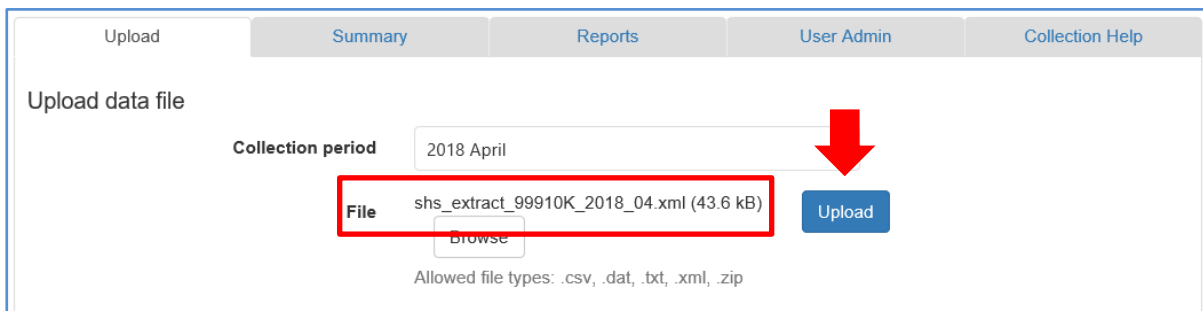

When you have multiple agencies in your account, Validata™ automatically identifies which agency's extract is being uploaded and assigns your upload to the correct Agency ID.
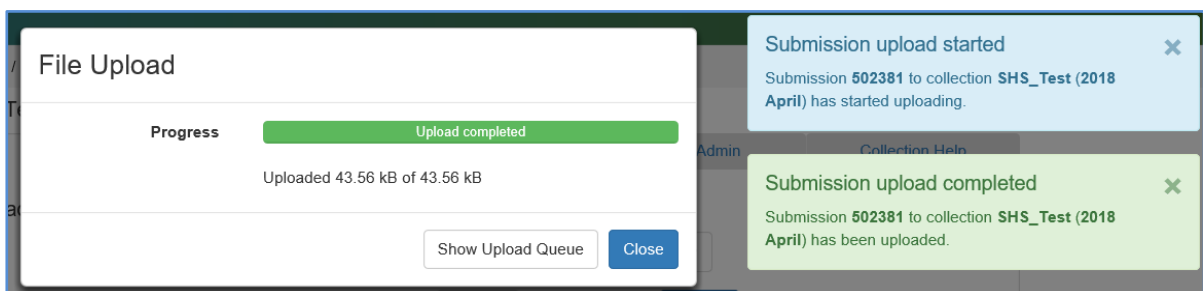
4.2.4 Upload the extract file

The selected extract should now appear on the 'Upload' tab in the 'File' box.

5.   Select 'Upload' to start uploading the extract to Validata™.

6.   Messages will appear on the screen to notify the progress of the file upload.

7. Select 'Close' to return to the Upload screen.

File Upload

Progress	Upload completed

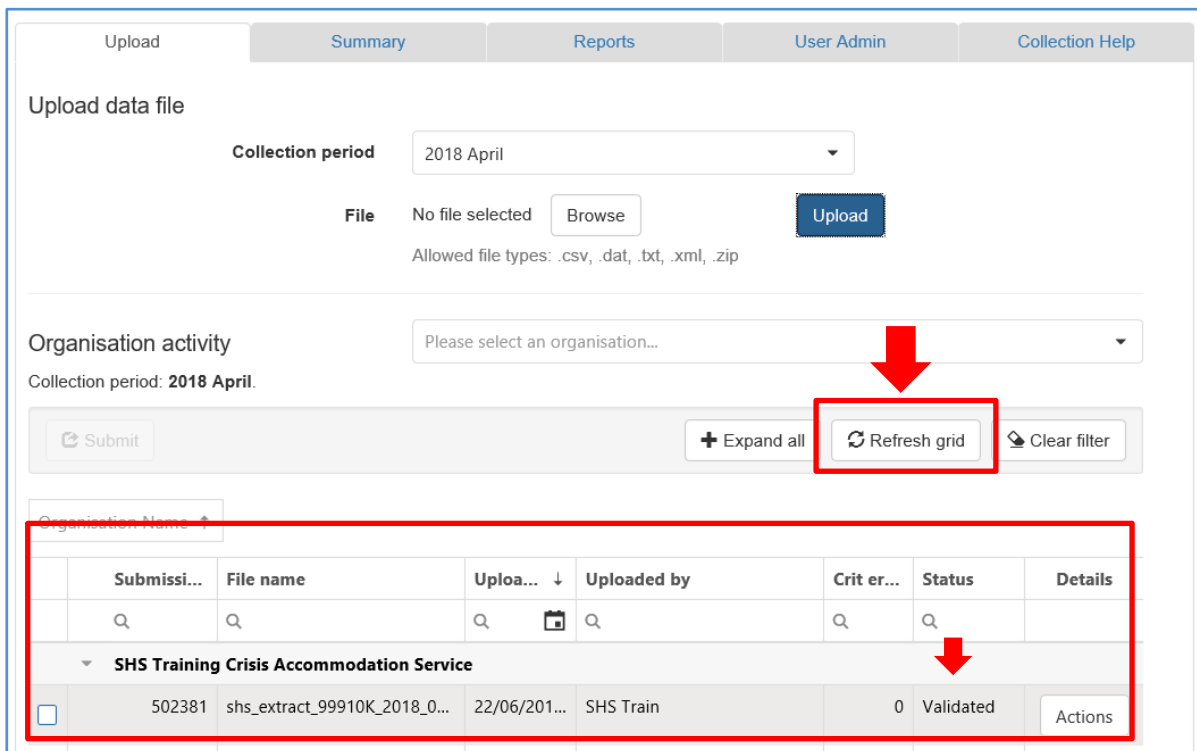Uploaded 31.76 kB of 31.76 kB

Show Upload Queue   Close
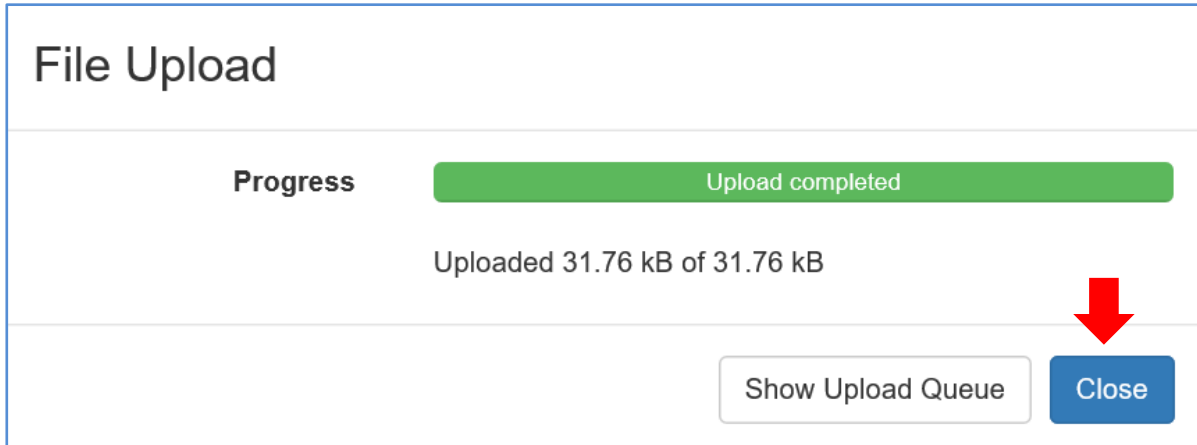
ℹ️ Users can also use the 'Show Upload Queue' option to track the status of their uploads.

4.2.5 Validation process

Validata™ will automatically begin checking the extract for errors.

8. Select 'Refresh grid' to update the validation status of the extract.
9. The extract appears in the 'Organisation activity' table located at the bottom of the Upload tab.

Upload	Summary	Reports	User Admin	Collection Help

Upload data file

Collection period	2018 April	▼	
File	No file selected Browse		Upload
	Allowed file types: .csv, .dat, .txt, .xml, .zip		

Organisation activity   Please select an organisation...   ▼

Collection period: **2018 April**.

⟳ Submit   ➕ Expand all   ⟳ Refresh grid   ◆ Clear filter

	Submissi...	File name	Uploa... ↓	Uploaded by	Crit er...	Status	Details
	🔍	🔍	🔍 📅	🔍	🔍	🔍	
▼	**SHS Training Crisis Accommodation Service**						
☐	502381	shs_extract_99910K_2018_0...	22/06/201...	SHS Train	0	Validated	Actions

⚠️ To view the various validation stages it is important to **select 'Refresh grid'** throughout the validation process. Alternatively, wait for the final validation status to be displayed (e.g. Validated/Failed).

Update the validation status by selecting 'Refresh grid'.

Status types change a number of times throughout the upload, validation process and submission process.

The various stages include:

- **Scanning:** Preliminary system checks to confirm that the extract is in the correct file structure.
- **Loading:** The file structure is correct and is in the process of being loaded to the system.
- **Validating:** The extract has passed further system checks and is undergoing the validation process.
- **Validated:** The validation process has completed and validation results are available to view and act upon.
- **Failed:** The extract has failed to commence the validation process for one of the following reasons. See Section 4.7 for more information about failed extracts.
- **Submitted:** The submission process is complete. Validation results have been checked and the extract has no critical errors and has been submitted to Validata^TM.

4.2.6 Validation email

10. An email confirmation detailing the validation outcome will be sent to the user.

Submission - validated   Inbox   x

no-reply@aihw.gov.au
to me

Note: Please **DO NOT** respond to this email. This is a system generated email.

- Organisation ID: 99910K
- Organisation Name: SHS Training Crisis Accommodation Service
- Collection month: 2018 April
- Filename: shs_extract_99910K_2018_04.xml
- File uploaded date/time: 20/06/2018 02:19:54 PM

Dear SHS Train,

A file you uploaded has been moved to a **validated** status. To view the details of this action please return to Validata.

You can contact your collection administrator for assistance.

Regards,

Validata Admin Team

If your extract has been validated, this is not the end of the submission process. You **MUST** check if the extract contains critical errors and remember to **'Submit'**.

4.2.7 Extract Status

Both the status of an extract and the number of critical errors are displayed in the table at the bottom of the 'Upload' tab.

This table also provides summary information about the uploaded extract including:

- Submission ID
- File name
- The date and time the file was uploaded (Uploaded)
- The name of the person who uploaded the extract (Uploaded by)
- The number of critical errors in an extract (Crit error)
- Validation status (Status)
- Details (Select 'Actions' to access details of validation results).

When the validation process is complete, an extract will have a status of either 'Failed' or 'Validated'.

In the example below, the extract has been validated and has zero critical errors.

Validata™ has recognised the organisation name from the extract.

⚠	An extract with zero validation errors **MUST BE SUBMITTED** to complete the process. See below for how to submit an extract.

For information about critical errors, see Section 4.4 and Section 4.5.

For information about failed extracts, see Section 4.7.

4.3 Submitting an extract

An extract can only be submitted to Validata™ if it does not have any critical errors.
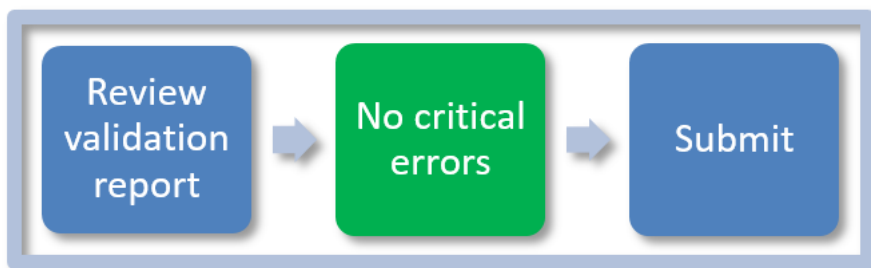
The following example shows how to submit a valid extract, with zero critical errors.

4.3.1 Locate extract and select 'Actions'

1. Select the relevant collection month and locate the extract to be submitted.

2. Select 'Actions' to open the 'Validation Details' window to check validation results.

> It is important to ensure that the extract does not contain any critical errors.
> In the example above, the status is 'Validated' and the extract has '0' critical errors.

4.3.2 Check validation results

In the example below, the 'File Validation Details' window does not display any critical errors and the extract file will be ready to submit to Validata™.

3.   Select '+ Expand all' **OR** '+ Information' to view all of the validation summary.

In the example below, the extract contained 4 support periods and 6 unassisted records.

4.   Select '- Collapse all' to close this section.

4.3.3 Submit the extract

5. Select 'Submit'.

6. A 'Submission Confirmation' box will appear advising that the file will be submitted to the AIHW and used for reporting purposes.
   Select 'Confirm' to complete the submission process.

4.3.4 Check the status of the submitted extract

7. On the 'Organisation activity' table on the 'Upload' tab, check that the status of the extract is 'Submitted'.

> ⓘ If the status of the extract is unchanged or it does not appear, wait 10 seconds then select 'Refresh grid'.

4.3.5 Submitted notification email

8. A confirmation email will confirm that the extract has been submitted.

4.3.6 Submitting multiple extracts

For organisations with numerous extracts to submit for the same collection month, it is possible to submit multiple extracts at the same time.

1. Check the boxes next to the files to be submitted.
2. Select the 'Submit' tick box located under 'Organisation activity'.
3. Select 'Confirm' to complete the submission process.

4.4   Extract with critical errors

An extract cannot be submitted unless its status is 'Validated' and the extract contains **ZERO** critical errors. The extract's validation status, along with the number of critical errors, is displayed in the 'Organisation activity' table at the middle of the 'Upload' tab. If the status of an extract is 'Validated' but it has critical errors, these errors will need to be fixed before an extract can be submitted to Validata™.

Steps to resolve critical errors:
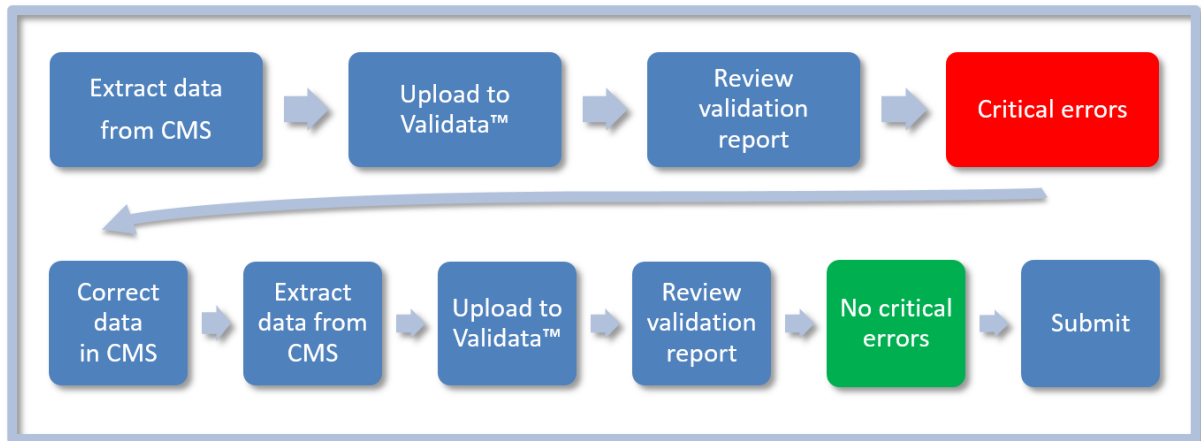
4.4.1   Viewing critical errors

In the following example, an extract is uploaded for 'SHS Training Crisis Accommodation Service' (Agency ID 99910K) for May 2018 collection period. This extract has critical errors that will need to be fixed before the extract can be submitted.

Find the extract

1.   Select the relevant collection month.
2.   If you have access to more than one agency, select the relevant agency for which you want to view results.
3.   Find the most recently validated extract in the 'Organisation activity' table' by checking the time uploaded in the 'Uploaded' column (the latest upload is at the top).
4.   Select 'Actions' to access the validation details of the critical errors that require fixing.

In this example, a count of 4 critical errors are displayed in the 'Crit error' column.

How to search for an extract in the 'Organisation activity' table

- Search for extracts using the search fields located in the top row of the 'Organisation activity' table. The easiest method to search for an extract is by 'Upload'.
- Select the date the extract was uploaded using the calendar icon that appears at the head of the 'Upload' column.
- Search any column by entering the first few letters in the search row.

In the example below, 'v' for validated has been entered at the top of the 'Status' column.

`

4.4.2 File validation details

The 'Validation details' window details the extract's critical errors.

Note the error message stating that this file cannot be submitted.

5. Expand the results by selecting the '+' next to 'Critical' under 'File Validation Details'.

4.4.3 Viewing the details of each critical error

6. Select the '+' next to each critical error to display further details OR select '+ Expand all' to display details of all critical errors.

The 'Information' section displays a count of support periods and unassisted person records.

When expanded, each critical error will display an error code, a message providing a brief description of the error and the alpha code and date of birth of the client in your CMS.

The example below shows the most common critical error which might appear in SHS extracts – C07.004.04. More information on how to fix this particular critical error can be found in

4.4.4 Downloading the details of each critical error

It is possible to download the details of each critical error, and the information included under 'Information'. The file will include information to identify records that contain errors and provide details of the error in user-friendly language. Refer to important variables such as 'client identifier', 'date of birth' and 'episode start date' to locate which records needs to be fixed.

The file also provides a count of the number of support periods and unassisted records contained in the extract.

7.   Select 'Download detailed report' link to download errors into a zip file, which you can refer to when fixing the errors in your CMS.
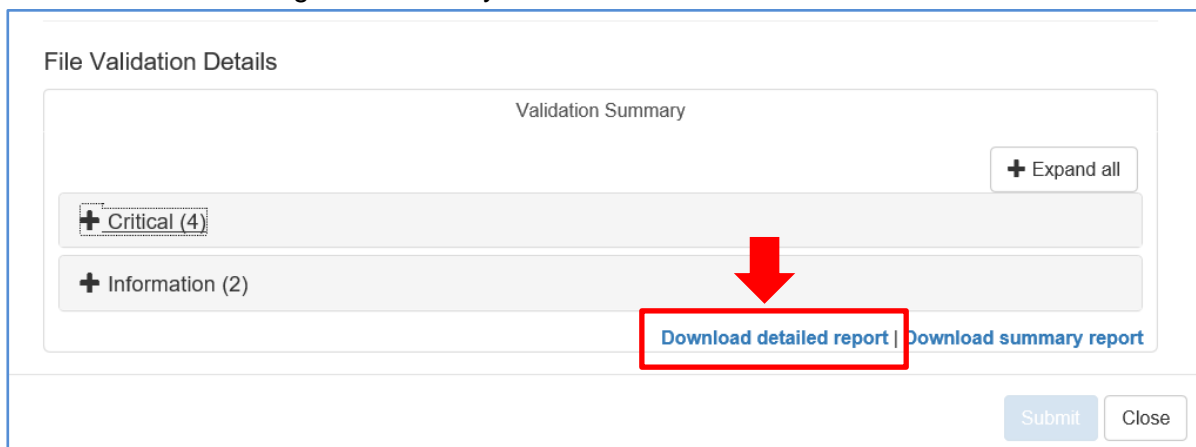
4.4.5 Downloading a summary report of critical errors

A summary report is also available to download. This includes information about the number and types of errors incurred, but does not include any details about which client record has the critical errors.

8.   Select 'Download summary report' to download a zip file with this information.
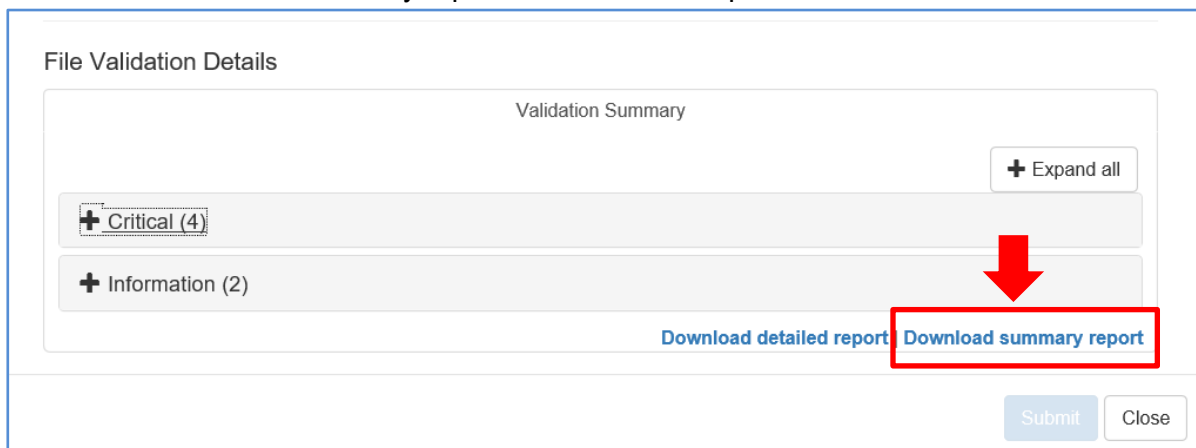
4.5 Understanding critical errors

4.5.1 What causes critical errors?

To ensure data quality, the SHS Collection has developed a set of specific rules known as edit rules, which are applied during the validation process. If the extract has records that fail the edit rules, then critical errors will be generated.

The errors need to be fixed in your own CMS. A new extract will need to be generated and loaded to Validata™ until all errors are resolved. When the validated extract has no critical errors it can be submitted.

If it is not clear how to resolve an error then contact the AIHW SHS Hotline to get assistance to fix the record.

4.5.2 Types of critical errors

Errors can be classified as:

- **Invalid format:** Where data is submitted in a format that can't be processed correctly, e.g. 'Tuesday 5th June' instead of '05062018'.
- **Invalid values:** When an invalid code number is used, e.g. income source = '8'.
- **Inconsistent values:** When one value does not seem to match up with another piece of data about the same presenting unit. For example, when a client is recorded as being someone's grandparent, but their date of birth suggests they are 10 years old.

4.5.3 Edit rules and your CMS

Software developers who build CMSs to submit data to the SHS Collection are provided all of the edit rules to enable them to incorporate validation into their product. This means that many CMSs prevent users from creating errors during the data entry process.

> Edit rules that a check data across collection periods are very difficult for a CMS to implement. These can only be identified after an extract is loaded to Validata™ and some unanticipated errors may be generated.

4.5.4 Interpreting validation error results

A detailed report of validation results can be downloaded in a 'zipped' file. This will contain a .csv file that can be opened in Microsoft Excel, containing full details of the client records that incurred the error to enable them to be fixed in your own CMS.

Validation results contain the following column headers:

- **TopLevelRecordIdType:** 'Organisation ID' includes client records. 'CountName' provides a count of Support Periods and Turnaway records in the extract.
- **TopLevelRecordId:** Agency ID
- **ValidationDesc:** Describes the error in user friendly language
- **ErrorMessage:** Provides the edit rule using technical language
- **Priority:** Level of error – for example, 'Critical', 'High', 'Warning'
- **SubmissionId:** Validata™ submission ID
- **ValidationCode:** Code of edit rule which triggered the validation error
- **VariablesOfInterest:** Variables that assist to identify the record that requires fixing.

4.5.5 Locating client records that require fixing

Validata^{TM} does not receive any client names, only their alpha codes. Therefore, a search by alpha code will be required to locate a record in your CMS that requires fixing.

An alpha code is created from the 2nd and 3rd letters of a client's given name, and the 2nd, 3rd and 5th letters of their family name. When the name is too short, a '2' is inserted.

The example below shows the types of information, including alpha code and date of birth, which can be used to locate a client record that requires fixing. This information can be found under 'VariablesOfInterest' column in the downloaded validation results file.

> Organisation_Id=99910K, Support_Period_Id=5660, **Date_Of_Birth=13062017**, Episode_Start_Date=20082017, Sex=2, **Alpha_Code=LIENE**, ADF_Ind=1, SP_Submission_Ind=0

Variables of interest, including alpha codes, are also displayed on the File Validation Details Summary, which can be accessed by selecting the 'Actions' button – see example below.

> Only the submitters and owners of the data have access to view the error details in the File Validation Details reports. Error details are not displayed in the Summary tab.

Tips for fixing critical errors

It is possible to fix a number of errors with just one correction. Validata™ checks for some key fields, and makes sure they are in the correct format. If the formats are incorrect, then these key fields can trigger a number of rules associated with the same field.

For example, if the date of birth field is incorrect, then any of the other checks that look at age will trigger errors. This means that by correcting the date of birth, a number of other errors may be fixed at the same time.

Find the date the extract was uploaded by selecting the calendar icon that appears at the head of the 'Upload' column.

4.5.6 The most common critical error

Ongoing client record not included in the previous month's submission

The flowchart below shows the most common critical error that SHS agencies encounter.

This error usually occurs when an agency worker enters a new support period which starts in a collection month that has already been submitted to Validata™. The new support period will not have been submitted to the AIHW.

When the next month's data is loaded, Validata™ identifies an ongoing client record is missing from the previous month's submission and generates a critical error.
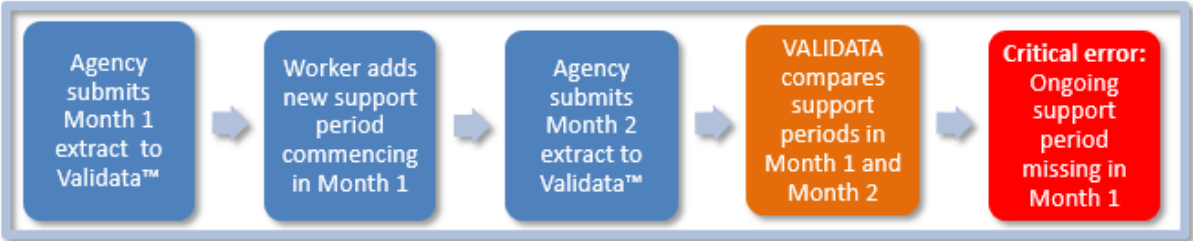
This error is easily fixed by re-running and re-submitting affected extracts from the previous collection month(s).

To determine the affected collection months, note the month of the episode start date of the affected record and re-extract and resubmit files in consecutive order from that month onwards.
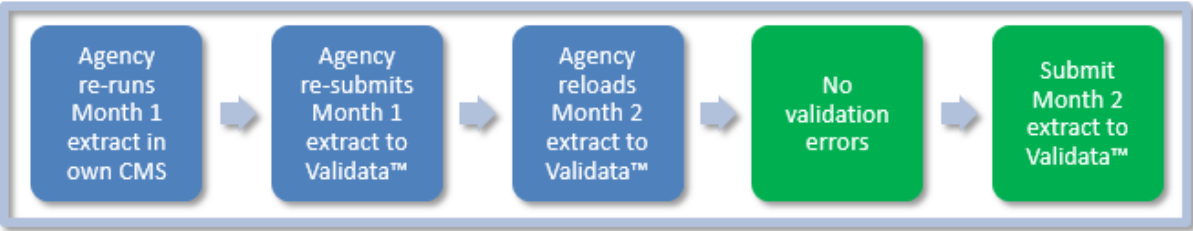
> ⓘ Client records do **NOT** need to be updated in your CMS to fix critical error C07.004.04. Simply re-extract and resubmit files for the affected months to pick up the missing records.

> ⚠️ Re-extract and resubmit files for all collection periods in consecutive order, starting with the oldest month.
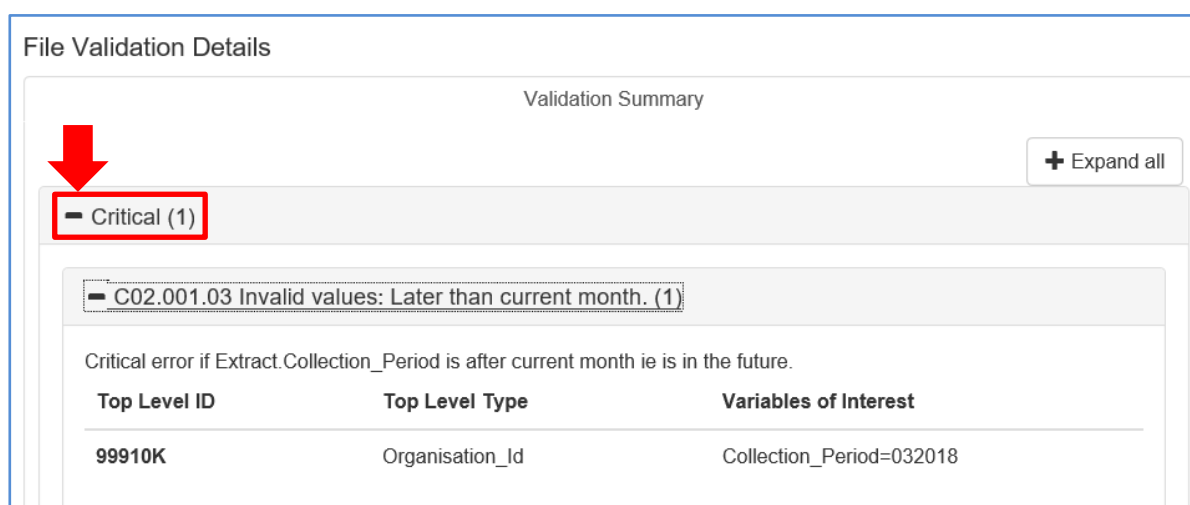
4.6 Other upload errors

The following errors are not related to the quality of the data in the current file. Rather, they are related to comparison checks on previously loaded files to ensure ongoing records are correct, extracts are loaded in the correct order and to the correct collection period.

4.6.1 Collection period and SHS extract month do not match

If an extract is uploaded to the wrong collection month, the extract will still be validated and the results will appear under the associated organisation.

A critical error will be generated stating that there was a discrepancy in the extract month of the collection periods selected. This can be rectified by ensuring that the collection period in Validata™ corresponds with the month of the SHS extract for the next upload.

The example below shows details of the critical error which will be displayed in the 'Actions' page.

4.6.2 Data for the previous collection period not submitted

An extract from the previous collection period must be validated and submitted before the current month's extract can be submitted. Validata™ will validate the file for the current month, but will generate a critical error stating the extract for the previous month must be submitted first.

In the example below, an extract for May 2018 was uploaded before the extract for April 2018 had been submitted. This has resulted in numerous errors for CO7.004.04.

This error can be easily resolved by submitting the April 2018 extract then re-uploading May 2018 extract.

+ Expand all

— Critical (5)

— C07.004.04 You have included an ongoing client record in this collection period which cannot be found in the previous month. Please re-run and re-submit all extracts to Validata starting from the first month of this client's support **(4)**

Critical error if SP_Support_Period.SP_Submission_Ind is in (1, 2) and a record is not in the directly preceding collection period with the same key (Organisation_ID, Support_Period_ID, Episode_Start_Date)

Top Level ID	Top Level Type	Variables of Interest
99910K	Organisation_Id	Organisation_Id=99910K, Support_Period_Id=3788, Date_Of_Birth=10101997, Episode_Start_Date=02042018, Sex=2, Alpha_Code=ALESE, SP_Submission_Ind=1
99910K	Organisation_Id	Organisation_Id=99910K, Support_Period_Id=3789, Date_Of_Birth=01071950, Episode_Start_Date=11042018, Sex=2, Alpha_Code=HAG22, SP_Submission_Ind=1
99910K	Organisation_Id	Organisation_Id=99910K, Support_Period_Id=3791, Date_Of_Birth=01062009, Episode_Start_Date=11042018, Sex=2, Alpha_Code=RAG22, SP_Submission_Ind=1
99910K	Organisation_Id	Organisation_Id=99910K, Support_Period_Id=3790, Date_Of_Birth=20101995, Episode_Start_Date=11042018, Sex=1, Alpha_Code=OBUTE, SP_Submission_Ind=1

⚠️ Always confirm that the previous month's extract has been **SUBMITTED** before loading the next month's extract.

4.7 Failed extracts

Extracts fail the upload process for a number of different reasons. A failed extract does not progress to the validation process. The flowchart below outlines all of the steps involved in submitting an extract that failed in the initial upload.
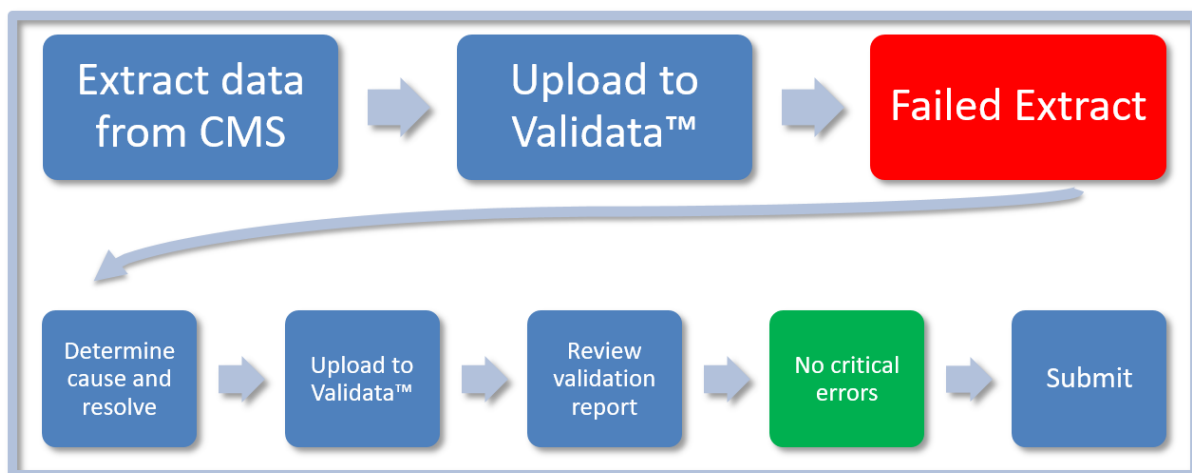
An extract may be rejected by Validata™ for one of the following reasons:

- The user does not have upload access to the agency in their user account.
- The Agency ID is not in the SHED file as participating in the SHSC for the selected month.
- The extract file is corrupted or has incorrect file structure.
- The SHED file for the selected month is not yet available.

4.7.1 Searching for failed extracts

1. In the 'Upload' tab, select the relevant 'Collection period'.

2. Search in the 'Organisation activity' table to locate the extract with 'Failed' status.

3. Sometimes failed extracts will not be allocated to a particular organisation and can be found listed under 'Ungrouped'.

4. Select 'Actions' to see why the upload has failed.

ℹ️ 'Upload' search field displays the most recent file at the top of the table.

4.7.2 Reasons extract failed

User does not have upload access

An extract cannot be loaded for an agency if no 'Upload' role has been assigned to a user account. If required, contact the agency manager with 'User Admin' access to request access to an 'Upload' role.

The example below shows the message received when a user does not have an 'Upload' role.

Agency is not in the SHED as participating for the selected month

Every month state and territory funding departments submit a SHED file with administrative details of which agencies are expected to submit extracts for a particular collection period. The details of agencies participating in the SHSC can change each collection period, with some agencies closing and new ones commencing.

In the example below, an extract was generated and uploaded but, according to SHED records, this Agency ID (99917A) was not expected to submit an extract (participate) for this collection month.

SHED is unavailable

Validata™ cannot accept extract submissions until the SHED file for the selected month has been received by the AIHW.

When a SHED file for your jurisdiction is unavailable, a message similar to the example above will be displayed, stating that your upload failed because your organisation is out of scope.

	Check the News section on the SHS landing page to see when Validata™ is ready to receive extracts for a new month.

Extract file is corrupted or has incorrect file structure

Validata™ only allows the following file types:

- .csv
- .dat
- .txt
- .xml
- .zip

Occasionally, a user might inadvertently select the wrong file, change the file extension or modify the extract in some other way. Ensure the file is in one of the above formats and retry the upload. If the problem persists and the correct extract file has been selected, contact the AIHW SHSC Hotline for further advice.

Checking for other failure types

There may be other reasons why an extract failed to undergo the validation process.

Check the following:

- Was the file in the correct format? SHIP and other CMS files should be in .xml format.
- Was the file edited after it was extracted?
- If a zipped file, which should include the agency extract only, ensure there are no other files in the zip.
- Was the correct extract file selected for upload?
- Was an empty file uploaded?

If all of the above reasons have been ruled out and upload failures persist, then contact the AIHW SHSC Hotline for advice, or your CMS provider for support.

4.8   Resubmitting an extract

An agency extract file can be submitted for the same collection period as many times as necessary. A submitted file can be superseded by submitting a new file. Only files that have a status of 'Submitted' at the end of the collection period will be used for reporting. Any new submission with automatically withdraw the previous one.

Agencies may need to re-run and resubmit extracts for one of the following reasons:
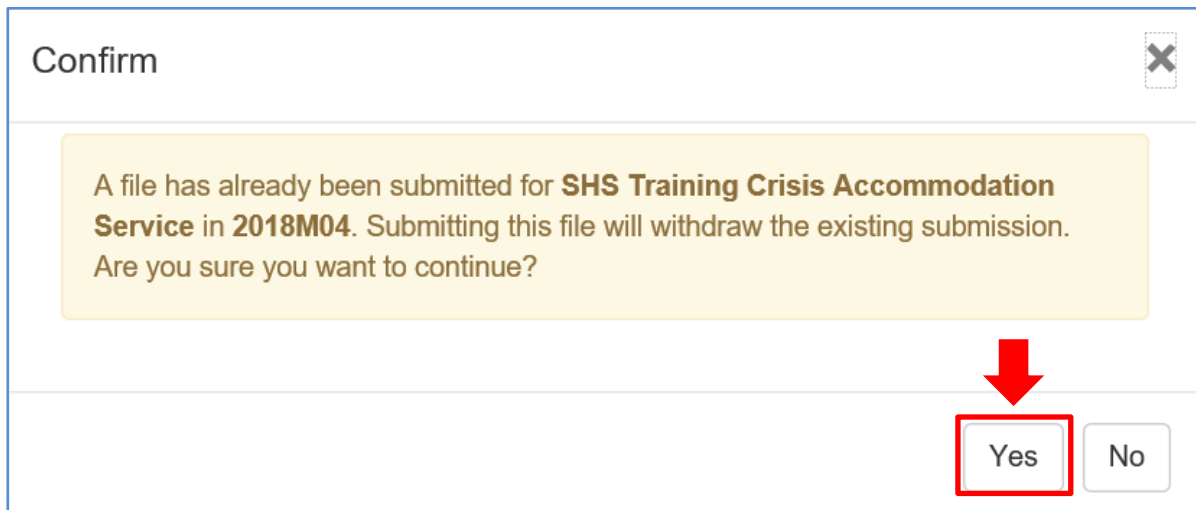
- to fix critical errors that may have occurred in subsequent collection months
- to include support periods that they may have forgotten to include in the previous submission
- to amend incorrect information that was included in the previous extract.
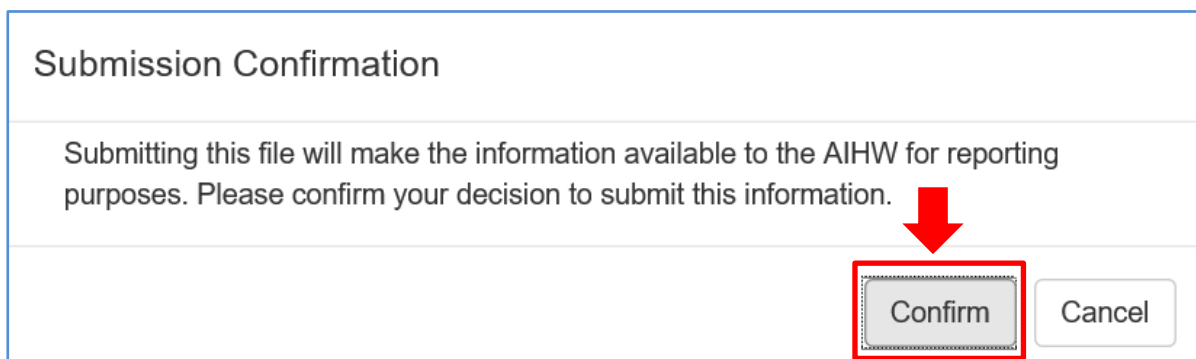
4.8.1 To resubmit an extract:

1. Upload the new extract file for the selected collection month.
2. Select 'View', in 'Organisation activity' table, to check the 'File validation details'.
3. If there are zero critical errors, select 'Submit'.

A new message will appear advising that a file has already been submitted for this agency.

4. Select 'Yes' to confirm the new file is to replace the previous submission.

5. Select 'Confirm' to complete the resubmission process.

> The most recently submitted extract does NOT overwrite the previous submission. The status of the previously submitted extract reverts to 'Validated'.

5 Summary

5.1   Summary tab functions

The Validata™ Summary tab provides a list of all agencies in the organisation and associated submission status of the extracts in a given collection month. Users will require the 'Summary' role for each agency in their organisation to monitor monthly submissions.

To view and download a summary of your organisation's submissions for a selected collection month.

Navigate to Summary tab	→	Select Collection Period	→	View summary of organisation activity	→	View validation results	→	Export summary of submission data

5.1.1   Summary tab vs Upload tab

The 'Summary' tab provides a useful overview of the status of submissions across an organisation. However, detailed information on statuses and validation errors can only be viewed in the 'Upload' tab.

Extracts can only be uploaded and submitted through the 'Upload' tab.

5.1.2 Overview of Summary tab
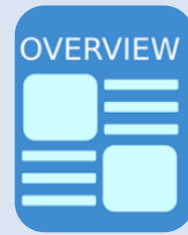
(1) **Collection Period:** Select month for query.

(2) **Refresh grid** Updates 'Organisation activity' table to display recent submissions.

(3) **Clear filter**: Clears any searches applied to the 'Organisation activity' table.

(4) **Export data:** Outputs summary information of submissions for each Agency ID, including status and date and time uploaded.

(5) **Name:** Organisation name.

(6) **Org ID:** SHS Agency ID.

(7) **Parent ID:** ID of the legal entity responsible for the SHS agency.

(8) **Org Type**: Type of organisation (i.e. agency, legal entity, agency/legal entity).

(9) **Status:** Displays current status of extracts for the selected collection period, including Outstanding, Failed, Validated and Submitted.

(10) **Type**: Organisation level summary (Filtered) and National summary of extract uploads.

n - SHS_Training / Summary

SHS_Training

| Upload | Summary | Reports | User Admin | Collection Help |

Organisation activity

(1) Collection period: 2018 April

(2) ⟳Refresh grid **(3)** ⬘Clear filter **(4)** ⬇Export data

(5) Org name	**(6)** Org ID	**(7)** Parent ID	**(8)** Org type	**(9)** Status
🔍	🔍	🔍	🔍	🔍
▸ SHS Training Youth Support Service ⓘ	99912G	99901X	Agency	Outstanding
▸ SHS Training Crisis Accommodation Service ⓘ	99910K	99901X	Agency	Submitted

(10) Type	Outstanding	Failed	Validated	Submitted	Total
Filtered	1 (50.0%)	0 (0.0%)	0 (0.0%)	1 (50.0%)	2 (100.0%)
National	8 (80.0%)	0 (0.0%)	1 (10.0%)	1 (10.0%)	10 (100.0%)

5.2 Viewing summary details

In the following example the Summary tab is displaying the status of extract uploads for 2 agencies – 'SHS Training Youth Support Service' and SHS Training Crisis Accommodation Service'. One agency has 'Submitted' status for April 2018 and the other agency (99912G) still needs to complete the submission process.

5.2.1 Summary of organisation activity

To view a summary of organisation activity:

1. Navigate to the 'Summary' tab.
2. Select the required 'Collection period'.

In the example below, the 2 agencies in the user's account are displayed, along with the ID of their legal entity (Parent ID), organisation type, and status of the upload. One agency has 'Submitted' status for April 2018 and the other agency (99912G) still needs to complete the submission process.

For users managing uploads for multiple agencies, the additional table provides a useful summary of how many agency extracts have a status of Outstanding, Failed, Validated and Submitted.

> The 'National' row provides a summary of extract uploads on a national level. The 'Filtered' row includes totals for the agencies the user has 'Summary' access for.

5.2.2 Status types

- **Outstanding:** There has been no attempt to upload an extract for this collection month.
- **Failed:** An extract has been uploaded but has failed to undergo the validation process.
- **Validated:** An extract has undergone the validation process. If zero critical errors, the file requires submitting.
- **Submitted:** An extract has been submitted to the AIHW.

5.2.3 Viewing submission activity

To view all submissions for an individual agency:

1. Select the agency to expand the view. Details of all extract uploads for this month are displayed.

2. Select 'View' for further details (in this example, viewing what types of critical errors occurred).

3. Select the Agency row to close 'Submission activity' details.

5.2.4 SHED contact details

Select the 'information' icon next to the name of the agency to view manager contact details nominated in the SHED.

5.2.5 Viewing validation summary results

In the submission details window, select '+ Critical' or '+ Expand all' to view the errors triggered.

The types of critical errors for this example are displayed below.

 Full details of critical errors are only available on the 'Uploads' tab.

5.3 Exporting summary data

For organisations managing multiple agencies, it may be helpful to export a consolidated summary of agencies and their submission status.

To export a submission summary:

1. Use the checkboxes to select the required agencies.
2. Select 'Export data' and choose from the following options:
   - **Export all summary data** – provides a summary of submissions for all listed agencies, including Org Name, Org ID, Parent ID, Org type and Status.
   - **Export selected summary data** – provides the above summary, but only for selected agencies.
   - **Export all submission data** – provides agency information and details of submission activity. See 5.3.2.

5.3.1 Exporting summary data

Select either 'Export all summary data' or 'Export selected summary data' to export to Excel a simple overview of submissions for a selected collection period.

The example below shows summary data for April 2018 for SHS Training agencies.

Org name	Org ID	Parent ID	Org type	Status
SHS Training Youth Support Service	99912G	99901X	Agency	Validated
SHS Training Crisis Accommodation Service	99910K	99901X	Agency	Submitted

5.3.2 Exporting all submission data

Select 'Export all submission data' to export to Excel a detailed report of submissions for a selected collection period, including the time that the extract was uploaded and the current submission status.

The table below shows all of the fields included in this file.

Data collection period	Org name	Org ID	Parent ID	Submission ID	File name
Status	Validated	Critical errors	Uploaded	Uploaded by	

6 Reports

6.1   Accessing reports

The Reports tab allows users with a 'Reports' role to view and/or download their SHS agency statistical summaries, which are generated by the AIHW quarterly. Reports are generated in both Excel (xls) and Portable Document Format (pdf) formats.

The steps required to locate, select and download agency statistical summaries:

| Navigate to Reports tab | Search for required reports | Select reports to download | Go to 'Export data' button | Select 'Download selected reports' |

> The Reports tab provides an interface for users to access the quarterly statistical summaries generated by the AIHW. It does not all user-defined summaries.

Availability of statistical summaries is dependent upon the following:
- the agency was included in the SHED file as participating during the reporting period
- whether data was submitted by the agency before the quarterly cut-off date.

For more information, refer to Section 6.3.

6.1.1 Agency and Legal Entity User Access

Agency users can only view their own agency statistical summaries. They can access summaries based on the roles and functions assigned by their agency manager and/or 'User Admin'.

> A Legal Entity user with a 'Reports' role can view statistical summaries for every agency in their organisation via one user account.

6.1.2 Overview of Reports tab
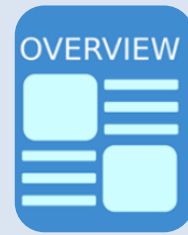
1 **Explanatory notes:** Provides important information about how reports have been generated.

2 **Clear filter**: Clears search parameters.

3 **Export data:** Includes options to export a summary of all available reports, summary of selected reports, or download content of selected reports.

4 **Abbreviation:** SHS Agency ID.

5 **Org name:** SHS Agency or Legal Entity name.

6 **Parent ID:** ID of the legal entity responsible for the SHS agency.

7 **Report name:** Naming convention – Agency ID_Reporting year_Quarter.

8 **Report period:** Naming convention – Reporting year_Quarter (3 Month, 6 Month, 9 Month or Annual).

9 **Created At:** Sort by this field to locate latest reports.

Welcome **SHS Train**   Upload queue   Help   Log o

✔ VALIDATA

HS_Training / Reports

SHS_Training

| Upload | Summary | Reports | User Admin | Collection Help |

Reports

▶ Statistical summary explanatory notes

⟳ Refresh grid   ✎ Clear filter   ⤓ Export data

	Abbreviation	Org type	Org name	Parent ID	Report name	Report period	Created At
	🔍	🔍	🔍	🔍	🔍	🔍	🔍 📅
☐	99912G	Agency	SHS Training Y...	99901X	99912G 2017 2...	2017_2018_6_m...	08/06/2018 09:...
☐	99912G	Agency	SHS Training Y...	99901X	99912G 2017 2...	2017_2018_6_m...	08/06/2018 09:...
☐	99912G	Agency	SHS Training Y...	99901X	99912G 2017 2...	2017_2018_3_m...	08/06/2018 09:...
☐	99912G	Agency	SHS Training Y...	99901X	99912G 2017 2...	2017_2018_3_m...	08/06/2018 09:...

6.2   Viewing and downloading statistical summaries

All statistical summaries for all agencies for which the user has a 'Reports' role will be displayed.

Search functions can be used to find particular reports. The 'Starts with' or 'Contains' search option is available in most columns. See example in 'Org name' column below.

6.2.1   Finding most recent reports

1. Select the 'Created At' column to sort by date and locate the most recently created report.

6.2.2   Finding an individual Agency ID

1. Enter the required Agency ID in the 'Abbreviation' search field.

OR

2. Enter the Agency ID in the 'Report name' search field.

6.2.3 Finding reports by file type

Reports are available in both .pdf and .xls format

To select .pdf format only:

1. Select 'Contains' search option.
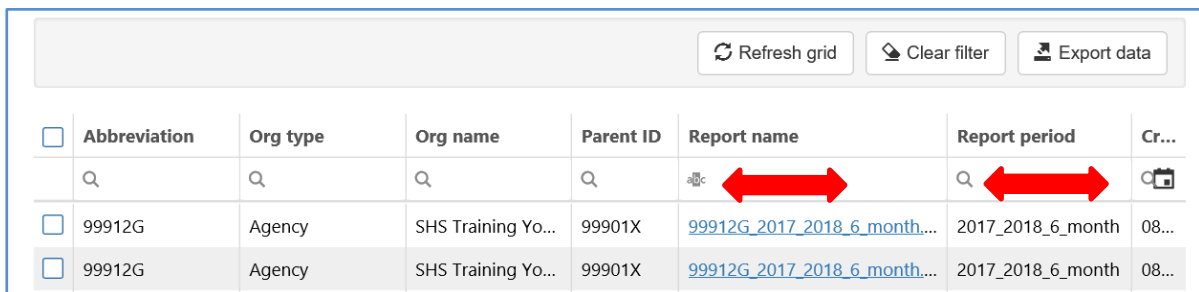2. Enter 'pdf' into 'Report name' field.

OR

To select .xls format only:

3. Select 'Contains' search option.
4. Enter 'xls' into 'Report name' field.

6.2.4 To find a report for a particular report period

Every column in the Reports table can be expanded to display the full contents.

1. Expand 'Report name' and 'Report Period' columns to display report names.

2. Enter name of Report period
   – for example '2017_2018_6_month'.

3. Reports from this period are now displayed.

6.2.5 More complex searches

More than one criterion can be applied to search for reports. In the example below, the search is looking for all of the pdf reports for the 2016-1017 9-month report period.

6.2.6 Exporting statistical summary reports

1. Select the required agency reports to export.

2. Select 'Export data'.

3. Select 'Download selected reports'.

4. Save or open the zip file.

The report is contained in a zip file.

5. Double click on the zip file.

6. Select 'Extract' to view options for extracting all files from the zip folder.

'Export all report data' produces a list of available reports. It does not include the actual reports.

6.3 Unable to locate a statistical summary

An agency statistical summary may not have been generated for the following reasons:

- The agency extracts were not submitted to Validata™.
- The extracts were not submitted prior to the quarterly cut-off.
- There was insufficient/missing data in the extract.
- The agency was non-participating during the reporting period.
- The agency extract contains unassisted person records but no support periods.
- The agency extracts were blank.

7 Further information

Where to go for information:

Specialist Homelessness Services Collection at the AIHW website

AIHW SHSC Hotline:

- Email: <homelessness@aihw.gov.au>
- Phone: 1800 627 191 (option 2)
- Open 9.00 am to 5.00 pm weekdays (AEST/AEDT).