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| How to run and export your  service delivery tracking reports  October 2023 |
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# Introduction

My Agency is the secure area of the Funded agency channel (FAC) website where registered users from funded organisations can access funding and payment information about their service agreement. If you require access to My Agency and/or are not a registered user, please refer to the <https://fac.dffh.vic.gov.au/how-register-my-agency> section of the Funded Agency Channel website <https://fac.dffh.vic.gov.au/my-agency-non-dffh-and-dh-staff>.

Within My Agency, under the Data and Performance section, there are a number of links available to funded organisations. Amongst these are reports relating to the online service delivery tracking acquittal data submitted on a monthly basis.

The following instructions detail the steps required to run and export these reports to a number of print friendly formats.

## Using this guide

This document includes information on how to:

* navigate to the Service Delivery Tracking page in My Agency
* run the SAM07 and the SAM08 reports
* export to Excel and PDF friendly versions

# Navigate to the Service Delivery Tracking page

1. When you log into My Agency, select “Service Delivery Tracking – [External link]”, located under the Data and Performance section of the My Agency page.
2. A new window will open and the Service Delivery Tracking page will display. On this page you will find the following:

* link to the Service Agreement Module, to enter your data
* links to the two reports which are described in detail in this guide
* service plan lead contact details, to assist with any counting rules queries
* contact details for technical assistance
* more information in the form of ‘How to’ guides and Frequently asked questions
* links to Policy and funding plans

# Run and export the SA07 – Service Delivery Tracking Trend Report

This report shows all submitted data for the selected financial year and can be filtered by activity and service plan division. Two excel friendly versions of the report are available to facilitate filtering, sorting and pivot tables. **Note:** Data in this Report is refreshed daily at 6am, 11am, 2pm and 4pm.

On the Service Delivery Tracking page, select “SAM07 – Service Delivery Tracking Trend Report [external link – opens in a new window]”, located under the Reports section of the Service Delivery Tracking page.

1. A new window will open and the SAM07 Service Delivery Tracking Trend Report will display. Described in the following section are the selection parameters available to run and export this report.
2. **Note:** the menu buttons that are described as standard internet browser buttons are specific to Internet Explorer. If they do not display on your browser version, do not be concerned, as they are not required to run or export the reports.

Fields, buttons and links

#### Financial year (field)

The current financial year defaults, but this can be changed by selecting the drop-down arrow inside the field for a list of available financial years.

#### Service plan division (field)

The <All> option defaults. This displays all service plan divisions applicable to your organisation’s service agreement(s). This option can be changed by selecting the drop-down arrow to the right of the field. From here, you can select one or more service plan divisions to display but, you must first deselect the <All> option.

**Note:** the (Select All) option works in the same way as the <All> option. It cannot be removed from the list for technical reasons and if selected, the report may take longer to run.

#### View Report (button)

Every time a new selection is made to one or more fields, the View Report button must be selected to display updated report results.

#### Activity (field)

The <All> option defaults. This displays all the activities against which your organisation is required to enter data. This option can be changed by selecting the drop-down arrow to the right of the field. From here, you can select one or more activities to display but, you must first deselect the <All> option.

**Note:** the (Select All) option works in the same way as the <All> option. It cannot be removed from the list for technical reasons and if selected, the report may take longer to run.

#### Include pending submission (field)

The <Yes> option defaults. This display includes any months for which an acquittal has not yet been submitted. This option can be changed to No by selecting the drop-down arrow inside the field.

#### Pagination (field)

Page one of the report defaults. If there is more than one page to view, the arrow to the right of the field will go to the next page and the next arrow will go to the last page of the report. Arrows to the left of the field work in the same way by going to the previous page and the first page.

#### Zoom (field)

A 100% defaults, but the size can be changed by selecting the drop-down arrow inside the field

#### Find text (field)

This field can be used to search for specific text on the page by entering the text you are searching for and then selecting the Find link to the right of the field. If there is more than one result, select the <Next> link.

#### Export formats (field)

The Select a format option defaults.

**Note:** the SAM07 Report was not designed to be exported to Excel as it contains merged columns. It is recommended that the Excel friendly version links (described below) be used instead of this Export option.

#### Refresh (button)

This is a standard internet browser button. It is recommended that the View Report button is selected to refresh the report to ensure all new selections have been incorporated.

#### Print (button)

This is a standard internet browser button. Additional software is required for this to work. It is recommended that the Excel friendly version links described below be used instead of this Print option.

#### Show/Hide Parameters (button)

This is a standard internet browser button. All fields default to show but can be hidden by selecting the Show/Hide button.

#### Excel friendly version where the months appear as columns (link)

This Excel friendly version has been designed to facilitate sorting, filtering and pivot table functionality in Excel. To export to Excel where the months display as columns, select the “Excel friendly version” where the months display as columns link. A File Download pop-up box displays. Select Open. The report header displays on Sheet 1, and the data on Sheet 2. The monthly target units and the monthly actual units display in column format.

#### Excel friendly version where the months appear as rows (link)

This Excel friendly version has been designed to facilitate sorting, filtering and pivot table functionality in Excel. To export to Excel where the months display as rows, select the “Excel friendly version” where the months display as rows link. A File Download pop-up box displays. Select Open. The report header displays on Sheet 1, and the data on Sheet 2. The monthly target units and the monthly actual units display in row format.

#### Service plan lead email (link)

Any questions regarding the template or the counting rules for any activity can be directed to the relevant department contact via email by selecting the Service plan lead email link.

# Run and export the SAM08 – Service Delivery Tracking Graphs

This report shows a graphical representation of the target units for the selected months within the selected financial year, as well as a breakdown by service plan division. The report can be filtered by activity and service plan division and is designed to export to PDF A4 landscape.

**Note:** Data in this Report is refreshed daily at 6 am, 11 am, 2 pm and 4 pm.

1. On the Service Delivery Tracking page, select “SAM08 – Service Delivery Tracking Graphs [external link – opens in a new window]”, located under the Reports section of the Service Delivery Tracking page.
2. A new window will open and the SAM08 Service Delivery Tracking Graphs will display. Described in the following section are the selection parameters available to run and export this report.

## Fields, buttons and links

#### Financial year (field)

The current financial year defaults, but this can be changed by selecting the drop-down arrow inside the field for a list of available financial years.

#### Service plan division (field)

The <All> option defaults. This displays all service plan divisions applicable to your organisation’s service agreement(s). This option can be changed by selecting the drop-down arrow to the right of the field. From here, you can select one or more service plan divisions to display but, you must first deselect the <All> option.

**Note:** the (Select All) option works in the same way as the <All> option. It cannot be removed from the list for technical reasons and if selected, the report may take longer to run.

#### View Report (button)

Every time a new selection is made, to one or more fields, the View Report button must be selected to display updated report results.

#### Activity (field)

The <All> option defaults. This displays all the activities against which your organisation is required to enter data. This option can be changed by selecting the drop-down arrow to the right of the field. From here, you can select one or more activities to display but, you must first deselect the <All> option.

**Note:** the (Select All) option works in the same way as the <All> option. It cannot be removed from the list for technical reasons and if selected, the report may take longer to run.

#### Include pending submission (field)

The Yes option defaults. This display includes any months for which an acquittal has not yet been submitted. This option can be changed to No by selecting the drop-down arrow inside the field.

#### Submission months (field)

The current and previous two months default. This can be changed by selecting the drop-down arrow to the right of the field. You will need to deselect any default months that you do not wish to include in your report.

#### Show/Hide Document Map (button)

This is a standard internet browser button, allowing report navigation in a different format. It is recommended that this option not be used.

#### Pagination (field)

Page one of the report defaults, and is the report header. This report will always have more than one page to view as it is designed to display the summary page of all service plan divisions selected and a separate page for each division. To view subsequent pages, the arrow to the right of the field will go to the next page and the next arrow will go to the last page of the report. Arrows to the left of the field work in the same way by going to the previous page and the first page.

#### Zoom (field)

A 100% defaults, but the size can be changed by selecting the drop-down arrow inside the field.

#### Find text (field)

This field can be used to search for specific text on the page by entering the text you are searching for and then selecting the Find link to the right of the field. If there is more than one result, select the <Next> link.

#### Export formats (field)

The Select a format option defaults.

**Note:** the SAM08 Report was designed to be exported to PDF A4 Landscape for possible discussion at meetings and for presentation purposes. Select this option from the drop-down arrow to the right of the field. A File Download pop-up box displays. Select Open to view the PDF.

#### Refresh (button)

This is a standard internet browser button. It is recommended that the View Report button is selected to refresh the report to ensure all new selections have been incorporated.

#### Print (button)

This is a standard internet browser button. Additional software is required for this to work. It is recommended that the report be exported to PDF A4 Landscape, as described above.

#### Show/Hide Parameters (button)

This is a standard internet browser button. All fields default to show but can be hidden by selecting the Show/Hide button.

#### Service plan lead email (link)

Any questions regarding the template or the counting rules for any activity can be directed to the relevant department contact via email by selecting the Service plan lead email link.

# Run and export the SAM010 – Service Delivery Tracking Target Composition

This report displays the composition/breakdown of the target units in the selected SDT template month down to commitment and sub activity level, as well as the actual units, YTD and any comments for each activity in the selected month for the selected financial year. **Note:** Data in this Report is refreshed daily at 6am, 11am, 2pm and 4pm.

1. On the Service Delivery Tracking page, select “SAM10 – Service Delivery Tracking Target Composition [external link – opens in a new window]”, located under the Reports section of the Service Delivery Tracking page.
2. A new window will open and the SAM08 Service Delivery Tracking Target Composition will display. Described in the following section are the selection parameters available to run and export this report.

#### Service plan division (field)

The <All> option defaults. This displays all service plan divisions applicable to your organisation’s service agreement(s). This option can be changed by selecting the drop-down arrow to the right of the field. From here, you can select one or more service plan divisions to display but, you must first deselect the <All> option.

**Note:** the (Select All) option works in the same way as the <All> option. It cannot be removed from the list for technical reasons and if selected, the report may take longer to run.

#### View Report (button)

Every time a new selection is made, to one or more fields, the View Report button must be selected to display updated report results.

#### Activity (field)

The <All> option defaults. This displays all the activities against which your organisation is required to enter data. This option can be changed by selecting the drop-down arrow to the right of the field. From here, you can select one or more activities to display but, you must first deselect the <All> option.

**Note:** the (Select All) option works in the same way as the <All> option. It cannot be removed from the list for technical reasons and if selected, the report may take longer to run.

#### Include pending submission (field)

The Yes option defaults. This display includes any months for which an acquittal has not yet been submitted. This option can be changed to No by selecting the drop-down arrow inside the field.

#### Submission months (field)

The current and previous two months default. This can be changed by selecting the drop-down arrow to the right of the field. You will need to deselect any default months that you do not wish to include in your report.

#### Show/Hide Document Map (button)

This is a standard internet browser button, allowing report navigation in a different format. It is recommended that this option not be used.

#### Pagination (field)

Page one of the report defaults, and is the report header. This report will always have more than one page to view as it is designed to display the summary page of all service plan divisions selected and a separate page for each division. To view subsequent pages, the arrow to the right of the field will go to the next page and the next arrow will go to the last page of the report. Arrows to the left of the field work in the same way by going to the previous page and the first page.

#### Zoom (field)

A 100% defaults, but the size can be changed by selecting the drop down arrow inside the field.

#### Find text (field)

This field can be used to search for specific text on the page by entering the text you are searching for and then selecting the Find link to the right of the field. If there is more than one result, select the <Next> link.

#### Export formats (field)

The Select a format option defaults.

**Note:** the SAM08 Report was designed to be exported to PDF A4 Landscape for possible discussion at meetings and for presentation purposes. Select this option from the drop-down arrow to the right of the field. A File Download pop-up box displays. Select Open to view the PDF.

#### Refresh (button)

This is a standard internet browser button. It is recommended that the View Report button is selected to refresh the report to ensure all new selections have been incorporated.

#### Print (button)

This is a standard internet browser button. Additional software is required for this to work. It is recommended that the report be exported to PDF A4 Landscape, as described above.

#### Show/Hide Parameters (button)

This is a standard internet browser button. All fields default to show but can be hidden by selecting the Show/Hide button.

#### Service plan lead email (link)

Any questions regarding the template or the counting rules for any activity can be directed to the relevant department contact via email by selecting the Service plan lead email link.

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