

# **ACR Tool User Manual**

## **Section 4**

### **Logging On, Passwords and Setting Up**

## Home Page

### Enter the Annual Complaints Reporting (ACR) Tool – Home Page

Click on this link or type the website address into your web browser.

<https://www.orima.com.au/acr/home.php>

You can also access the ACR Tool from the 'ACR Tool' link under "Quicklinks" on the bottom of every page on our website <http://www.odsc.vic.gov.au>



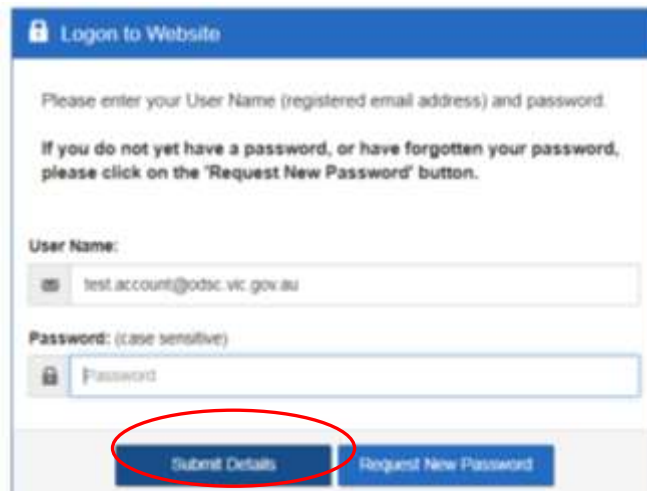
Prior to logging on, you can access 'Help with Logging on' from the home page (upper left corner). This provides assistance on how passwords are issued for the ACR tool and how to find out who your system administrator is. You can also access ORIMA's privacy statement (bottom right corner).

The screenshot shows the 'Annual Complaints Reporting (ACR) Tool' login page. At the top, there's a navigation bar with a menu icon (circled in red) and links for 'Help with logging on' and 'Please log on...'. Below this is a large blue box titled 'Login to Website'. Inside the box, it says: 'Please enter your User Name (registered email address) and password. If you do not yet have a password, or have forgotten your password, please click on the 'Request New Password' button.' There are two input fields: 'User Name:' with the text 'test.account@orima.com' and 'Password: (case sensitive)' with the text 'Password'. Below the fields are two buttons: 'Submit Details' and 'Request New Password'. At the bottom of the page, there's a footer with 'Top of Page', '© ORIMA Research 2018. All rights reserved. (v6.0)', and a 'Privacy Policy' link (circled in red).

## Logon and Passwords

### Logon to the tool

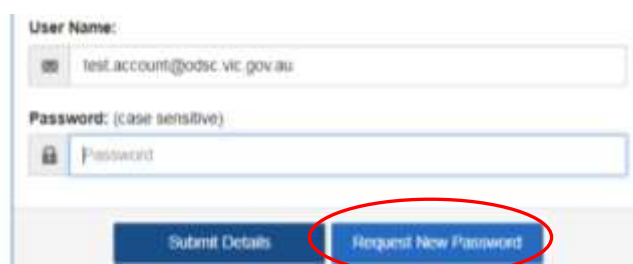
1. Open the logon page. Enter your User Name (email address) and logon password into the appropriate fields and 'Submit Details'.



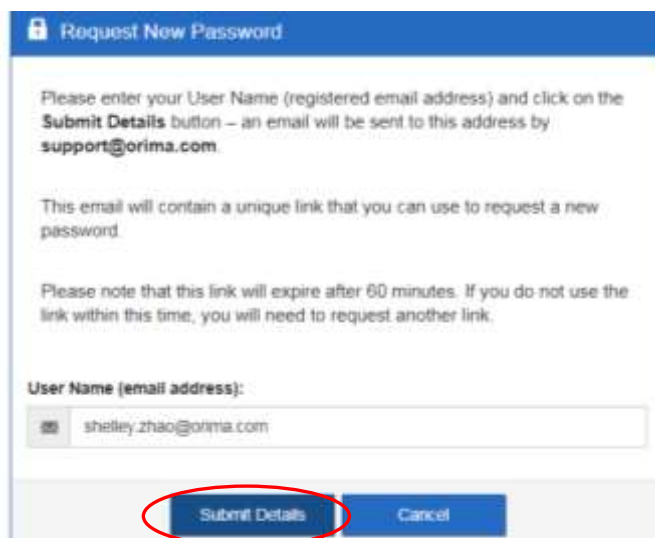
### Request new password

1. The system administrator in your service creates new users. If your service needs to establish an administrator in the first instance a new administrator logon can be requested via Disability Services Commissioner on 1300 728 187 or [acr@odsc.vic.gov](mailto:acr@odsc.vic.gov).

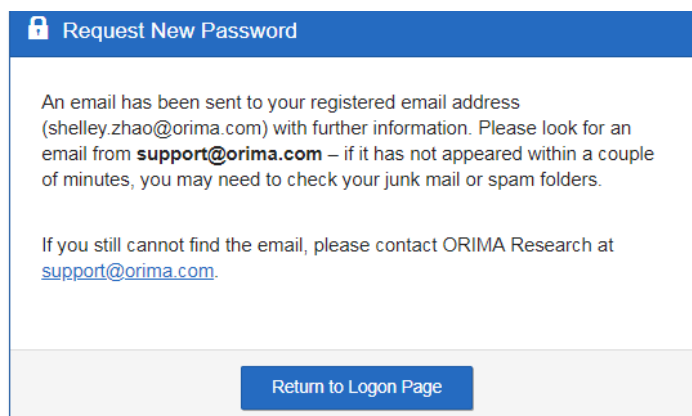
Once a user has been created on the system, they need to request a new password from the logon screen via the 'Request New Password' button. This button can also be used when users forget their password.



2. After selecting the 'Request New Password' button you will see the following screen:




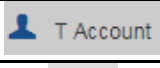



3. Select 'Submit Details' and you will receive the following message and instructions to follow. If you do not receive the email with your password within 5 minutes, email [acr@orima.com](mailto:acr@orima.com)



## Navigation

On the top of the screen you will see a navigation bar that contains the following five icons:

Icon	Description
	Main menu dropdown list
	Home page
	Help and Resources
	Account detail, including the level of access you have to the ACR Tool
	Current organisation (for those with 'Super User' access – See User Guide Section 3: User Access)

The main menu contains the following sections:

Menu item	Description
Home	About the Annual Complaints Reporting (ACR) Tool and how to contact the DSC regarding complaint reporting and access to the ACR Tool.
Help and Resources	Help and resources for using the ACR Tool, including: <ul style="list-style-type: none"> <li>• information on user access;</li> <li>• user manual to assist you to use the tool and on how to set it up for your organisation;</li> <li>• tools for uploading your annual complaints data (only available to organisations at request);</li> <li>• general information about the ACR Tool; and</li> <li>• individual organisation service provider reports and how to order them.</li> </ul>
<b>Complaints:</b>	
Add a New Complaint	The first step to adding a new complaint. It is where you enter your internal complaint ID (your own identifier for the complaint).
View and Update Complaints	This shows a list of all complaints created and managed by your service in the current financial year. This is where you add all complaint information after you have created a new complaint. You can also add new complaints, remove a complaint, view deleted complaints, edit a complaint, edit complaint profile details, change the internal ID, change the user complaints are allocated to, change demographic information and download a PDF copy of individual complaints. You are able to sort your complaints by different criteria or use the search function to find a record.
Complaint Data	This displays complaint data in a unit record database format and gives you the option to sort complaints via different filters – by funding source (DHHS, TAC, NDIA, other and/or not specified) or case status (open, closed, or both open and closed cases). You can also select complaints within a date range for the date received field. You can download (export) your complaints via Excel, and set out the data in a number of ways. Your previous financial years' complaints are also archived here.
Upload Complaint Data	This allows you to upload your complaint data using a spreadsheet that is prepared in a format consistent with the spreadsheet template provided in the Help and Resources section. Only available to services upon request.
<b>Compliments:</b>	
Add a New Compliment	The first step to adding a new compliment. It is where you enter your internal compliment ID (your own identifier for this compliment).
View and Update Compliments	This shows a list of all compliments created by your service in the current financial year. This is where you add all compliment information after you have created a new compliment. You can also add a new compliment, remove a compliment, view deleted compliments, edit a compliment, change the internal ID, change the user compliments are allocated to and download a PDF copy of individual compliments. You are able to sort your compliments by different criteria or use the search function to find a record.

Menu item	Description
Compliment data	This displays compliment data in a unit record database format and gives you the option to sort your compliments via different filters – by funding source (DHHS, TAC, NDIA, other and not specified), or case status (open, closed, or both open and closed cases). You can also select compliments within a date received range. You can download (export) your compliments via excel, and set out the data in a number of ways. Your previous financial years' compliments are archived here.
Submit Annual Report	You can submit your report during the annual reporting period in July.
Interactive Dashboard	The dashboard is designed to show aggregate results of complaints and compliments recorded by your organisation for the current financial year and to provide a comparison with the results from the previous financial year for your organisation or the state-wide average. The dashboard can also be filtered by funding source, case status and date received.
<b>View and Update:</b>	
Your Details	This is where you can change your name, email address and any other contact details.
View Organisation Staff	If you are an administrator you can view all users within your organisation and what level of access they have. You can also add new users, set their level of access, assign their supervisor(s) and specify their custom demographic (see below).
Service Details	This is where you maintain your service details including your service name, address and email address; name and email address of CEO; and the name of your main contact officer for complaint report and alternative contact. If you are an administrator, you can also specify a custom demographic variable here. The custom demographic variable can be a characteristic of your choice that can be allocated to both users and complaint/compliment records.
Case Notes	If you are an administrator, this is where you can select if your organisation wish to be able to provide the Optional Profile Information for complaints.
Feedback	You can make comments or suggestions about this reporting tool or the overall annual complaints reporting process.
Change Password	This is where you change your password. This is recommended when you are first given your password by ORIMA.
Logoff	Selecting 'Log Off' automatically logs you off the ACR Tool.

Bottom right hand corner	Description
Privacy Statement	Information on privacy and the collection of personal information.

## Updating Details

### Update Your Own Details

1. Select 'View and Update: Your Details' from the main menu.
2. Make the relevant changes and 'Save'. You are not able to change your own email address. If you wish to update your email address, please contact your organisation administrator, your level 1 supervisor or ORIMA Research to create a new account access for you.

The image shows two parts of the application interface. On the left is a vertical menu with various options. The 'View and Update' section is expanded, and 'Your Details' is highlighted with a red circle. On the right is the 'Your Details' form. It has a blue header with a user icon and the title 'Your Details'. Below the header, it says 'Please complete and keep the following information up-to-date.' The form contains several fields: 'First Name:' with the value 'Test', 'Middle Name:', 'Last Name:' with the value 'Account', 'Email Address:' with the value 'shelley.zhao@orima.com', 'User Type:' with the value 'Administrator', and 'Home State:' with a dropdown menu showing 'Please select...'. At the bottom of the form, there are two buttons: 'Save' and 'Close', both of which are circled in red. A note at the bottom of the form states '\* Mandatory fields'.


NOTE: 'User Type' is the level of access you have to the ACR tool, i.e Administrator, Level 1 or Level 2. This can be changed by an administrator (but not yourself, if you are an administrator) through 'View and Update: View Organisation Staff'.

### Change Password

1. To change your password, select 'Change Password'.
2. Enter your current password, your new password and confirm your new password. Ensure that your new password is at least 10 characters long, and contains at least one uppercase letter, one lowercase letter, one number and one special character.

The image shows two parts of the application interface. On the left is a vertical menu with various options. The 'Change Password' option is highlighted with a red circle. On the right is the 'Change Password' form. It has a blue header with a lock icon and the title 'Change Password'. Below the header, it says 'Please enter your current password, and then enter and verify your new password.' There is a note that says 'Note that your password must be at least 10 characters long, and contain at least one uppercase letter, one lowercase letter, one number and one special character (allowable special characters are ! @ # \$ % ^ & \* )'. The form contains three fields: 'Current Password:' with the value 'Current Password', 'New Password:' with the value 'New Password', and 'Verify New Password:' with the value 'Verify New Password'. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel', both of which are circled in red.

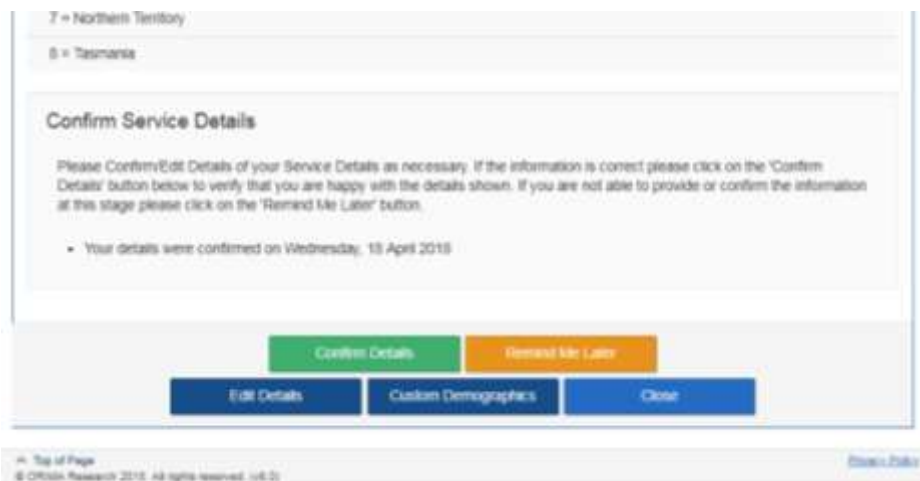
3. Click on “Submit” to change password. You will receive the following message and you will need to logon on again with your new password.

 Your password has been successfully changed. You will now need to log back in using your new password.

## Update your service details

Note: This can only be completed by staff with Administration access.

1. Select ‘View and Update: Service Details’ from the main menu.
2. Scroll down to the bottom of the screen and select the ‘Edit Details’.



3. Complete some or all of the following fields about your service including:

Service Provide Name

Address of Principal Office of your service and Generic Email Address (if available)

Name and Email address of the CEO (or equivalent) of your service

Service's Main Contact Officer for Complaints Reporting, including Name, Position, Phone Number and Email Address

Service's Alternative Contact officer for Complaints Reporting (Optional), including Name, Position, Phone Number and Email Address

This information may be used by the Disability Services Commissioner to maintain records for your service.

4. Select ‘Save’. This can be completed every time there are organisational changes.

## Creating or Managing Users

Multiple staff within your service can access the ACR tool. It also allows staff to be assigned different levels of access to complaint records within your service (for example to view complaints relevant to their team but not other parts of the organisation).

Access to complaints is determined by the ‘user level’ of the individual. There are 3 levels of users within the tool:

- ♦ Administrators – have access to all complaints and compliments within a service and can add or remove other users.



- ◆ Level 1 users – can create and view complaints and compliments made by themselves and by Level 2 users that have been allocated to them in the tool. They can also create and manage staff details of Level 2 users.
- ◆ Level 2 users – can create and edit complaints and compliments that they have created.

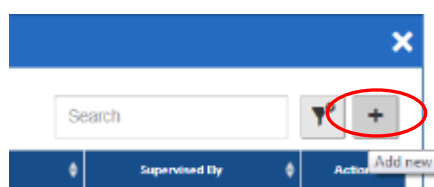
See Section 3 ‘User Access to the ACR Tool’ for more information on user access.

## Adding new users

1. Select ‘View and Update: Organisation Staff’ from the main menu.
2. Scroll down to the bottom of the screen and select ‘Add User’ or select the ‘Add new user’ icon (top right corner) .

		orima.com					<a href="#">Edit</a> <a href="#">Delete</a>
6289	RE, mabel	acr@orima.com	Level 1 User	South Australia			<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 5 of 5 rows



3. Enter the details of the new user such as first name, surname, email address, user type, and/or any custom demographic variables and then select ‘Save’.
  - a. If Level 2 user is selected, you will be prompted to select a supervisor for that user, select the box(es) next to the appropriate name(s) of the supervisor(s) and then select ‘Save’.

Add New User

Please complete and keep the following information up-to-date.

**First Name:\***

**Middle Name:**

**Last Name:\***

**Email Address:\***

**User Type:\***

Level 2 User

**Supervisor(s):\***

Note: If the user loses their logon details, he or she can reset the password following the instructions detailed in the “Request new password” section above.

## Editing user details

1. Select 'View and Update: View Organisation Staff' from the main menu.
2. Find the details of the user you wish to edit, and select 'Edit' on the right side of the screen.

🔍
+

[ userID ]	Name	Email Address	User Type	Home State	Supervised By	Supervised By	Action
6294	ACCOUNTS, TestS	tests.accounts@orima.com	Level 2 User	Victoria	3, mabel		<span>Edit</span> <span>🗑️</span>

Showing 1 to 1 of 1 rows

Add User
Close

3. Make the relevant changes to the user's details (First name, middle name, last name, email address, user type) and select 'Save'.

👤
User Details

Please complete and keep the following information up-to-date.

**First Name:\***

**Middle Name:**

**Last Name:\***

**Email Address:\*** ⓘ

✉️

**User Type:\***

Level 1 User
▼

**Home State:**



Please select...
▼



\* Mandatory fields

Save
Close


## Removing a User

1. Select 'View and Update: View Organisation Staff' from the main menu.
2. Find the details of the user you wish to remove, and select 'Remove user' on the right side of the screen (the recycle bin icon).


[ userID ]	Name	Email Address	User Type	Home State	Supervised By	Supervised By	Action
6294	ACCOUNTS, TestS	tests.accounts@orima.com	Level 2 User	Victoria	3, mabel		 

3. Choose another user from your service to reassign any users or records that the removed user may have had.

 **Remove User – John Smith**

Please select the alternative case manager for John Smith:

**Replacement case manager for complaints currently supervised by John:\***

Please select... 

\* Mandatory fields

Save

Cancel

Note: There must always be at least one administrator in each service. You cannot remove your own record or change your own user level.