

Guide for Councils and the State Planning Commission

Development Application, Workload and Financial Reporting

# Application and Operational Reporting

**Version 1.1**

16 February 2021

This Guide includes **Software Version 2.23.1** features and functionality.



**Government of South Australia**  
Attorney-General's Department



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## 1. Definitions and Acronyms

Term	Description
<b>AGD</b>	Attorney-General's Department
<b>ATO</b>	Australian Taxation Office
<b>Council</b>	The organisation or individual who will be responsible for running financial reports at the council.
<b>DAP system</b>	Develop Application Processing system – the new online development application lodgment and management system. It is based on Appian technology.
<b>GST</b>	Goods and Services Tax
<b>Power BI</b>	A business analytics service provided by Microsoft for creating reports and dashboards.

## 2. Introduction

This guide provides information regarding the reporting services (DAP and Power BI), an overview of the full suite of reports available to your councils, instructions on running these reports and exporting them to perform further analysis in Microsoft Excel, and/or to import into your own reporting platforms.

### **Important!**

The guide will be updated on a regular basis as new reports are built and released. Our recommendation is to view this guide online, to ensure you have the most recent version.

### **What is Power BI Reporting Service?**

**Power BI** provides cloud-based BI (business intelligence) services, known as "Power BI Services" along with a desktop based interface called "Power BI Desktop". It offers data warehouse capabilities including data preparation, data discovery and interactive dashboards. Power BI lets you easily connect to your data sources, visualize and discover what's important, and share that information with anyone or everyone you want.

For more information on Power BI visit <https://powerbi.microsoft.com/en-us/>.

### **What set-up is needed?**

#### **Preferred browser**

The preferred browser to run the reports designed in Power BI is Google Chrome.

#### **Software and licencing**

There is no requirement to download software and/or pay licensing costs to access the reporting services (DAP and Power BI). For councils that currently use the Power BI software to build and share reports, associated operational costs will remain the responsibility of the council.

#### **Online account to access the reporting services**

An online user account is required to sign in to the Power BI software, and the same online account is used to login to the ePlanning platform (DAP).

To request access to the suite of reports, email a 'Create new user account request' to the PlanSA Service Desk at [PlanSA@sa.gov.au](mailto:PlanSA@sa.gov.au) with the following information:

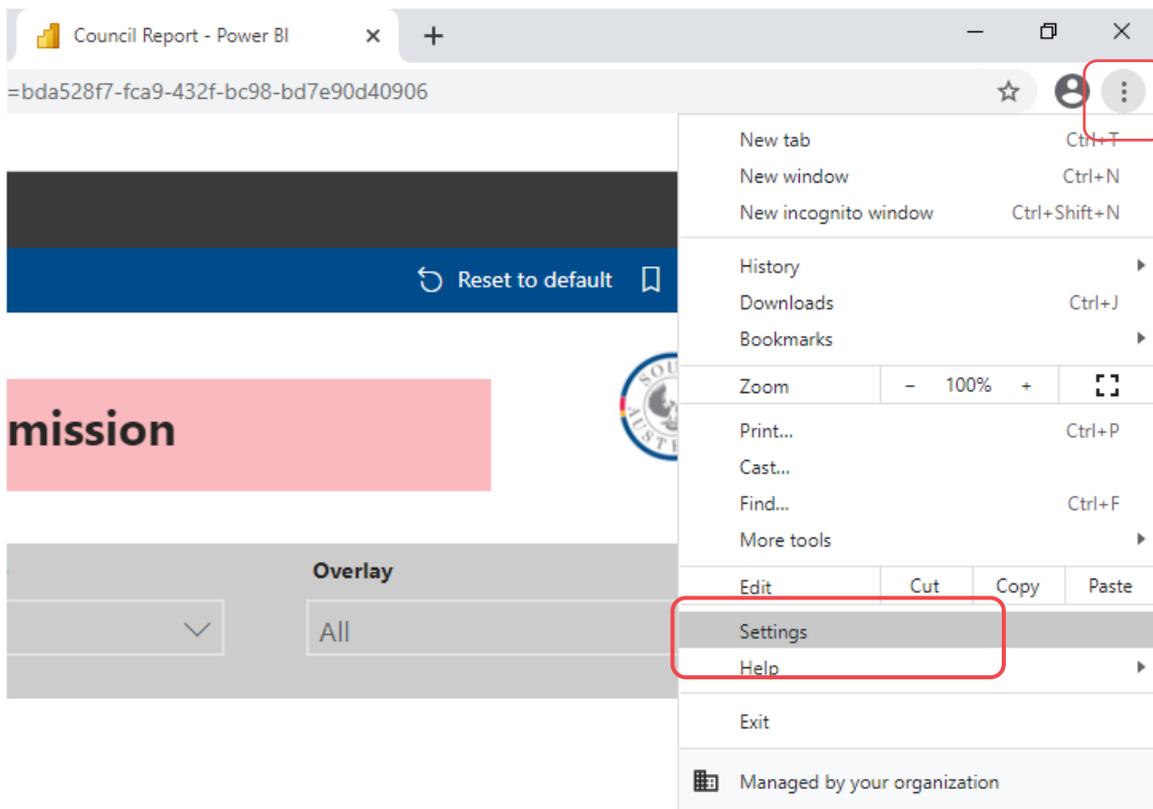
- Organisation
- Full Name
- Email Address
- Contact Phone Number
- Professional Accreditation Number (as required).

### Change the date format from English (US) to English (Australia)

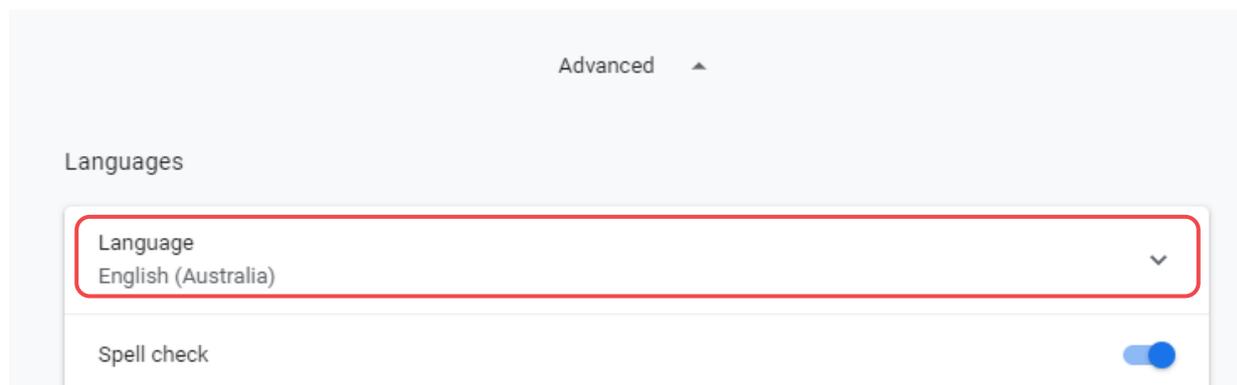
When the date displays in the US format (MM / DD / YYYY), follow the instructions below to change the Google Chrome browser language from US to English (Australia) and set the Power BI language to match your browser language settings.

#### Step 1 - Change Google Chrome browser language to English (Australia)

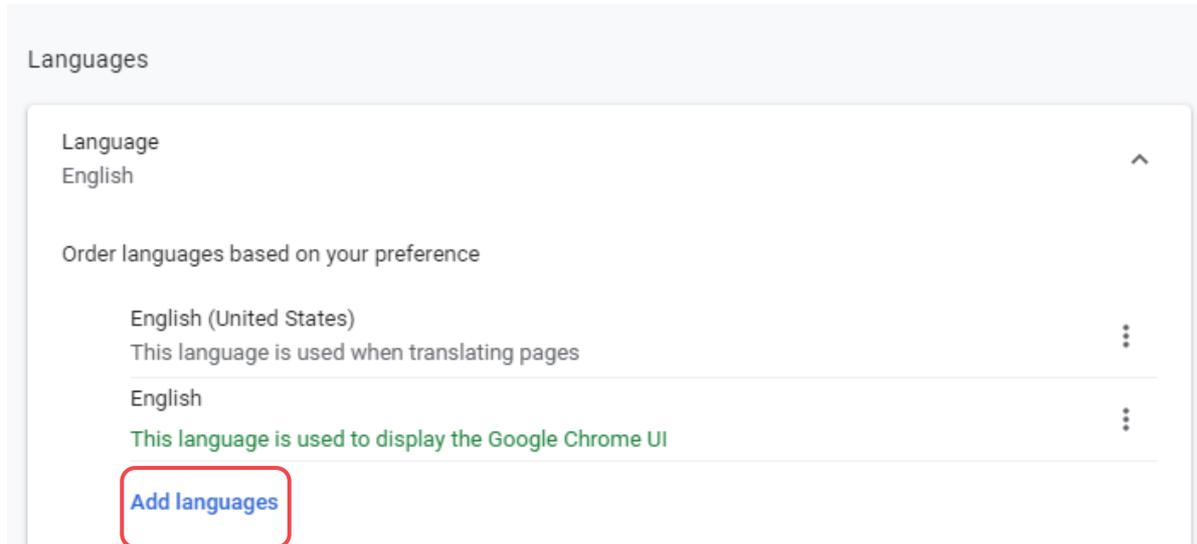
1. Click on the **three dots** in the open browser to show the menu.
2. Click on **Settings**.



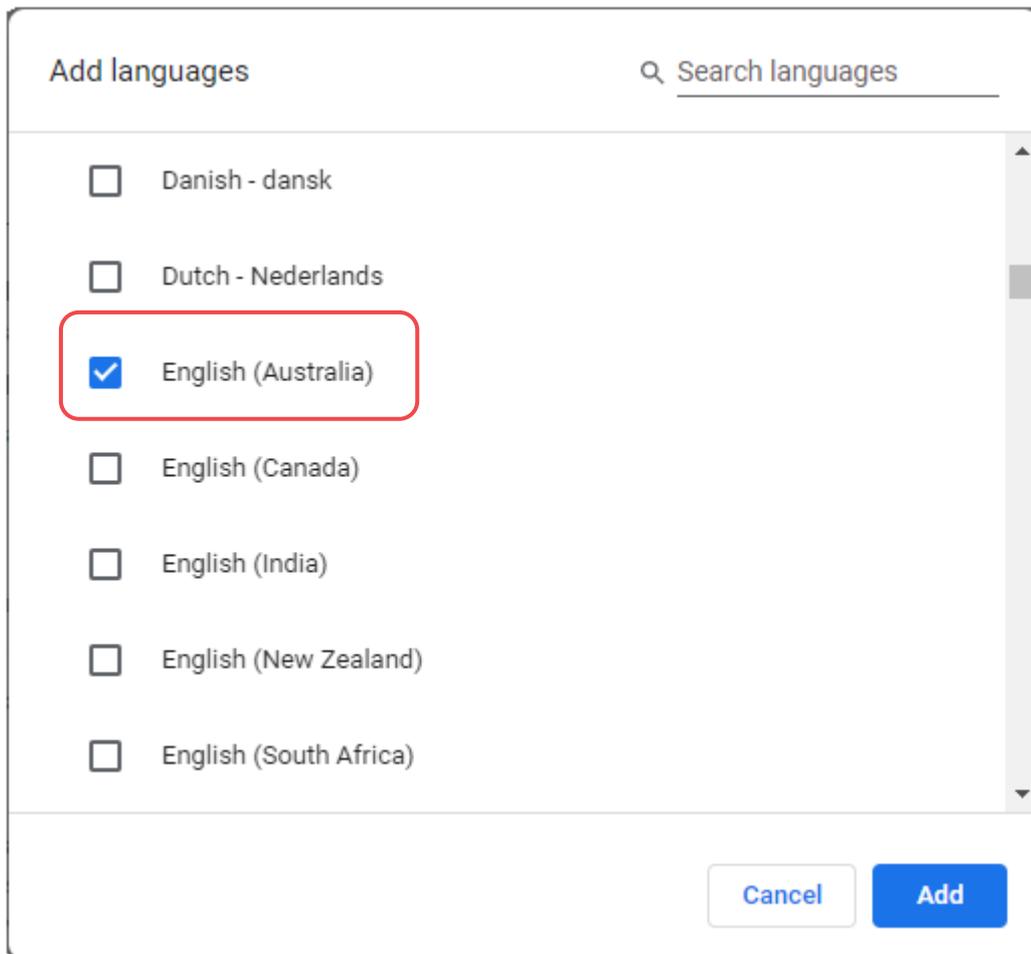
3. Expand **Advanced** to show the Languages option.
4. Expand Language to view preferences.



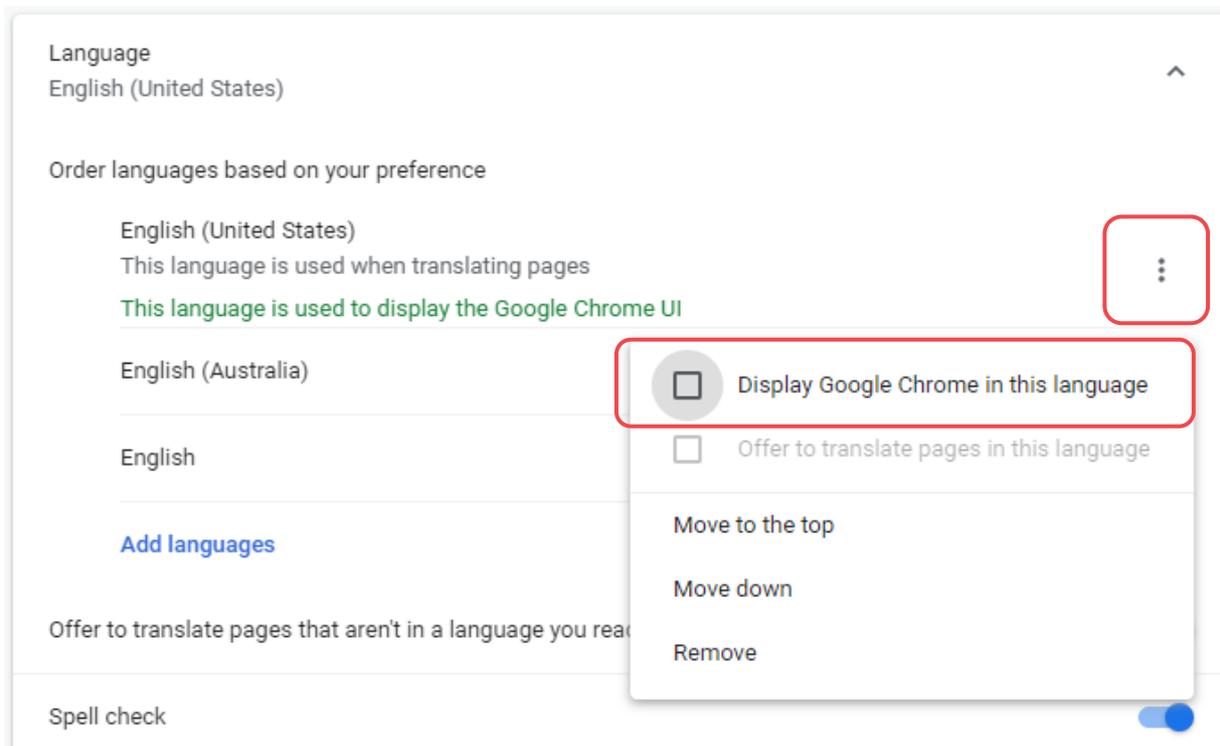
5. Click on **Add languages**



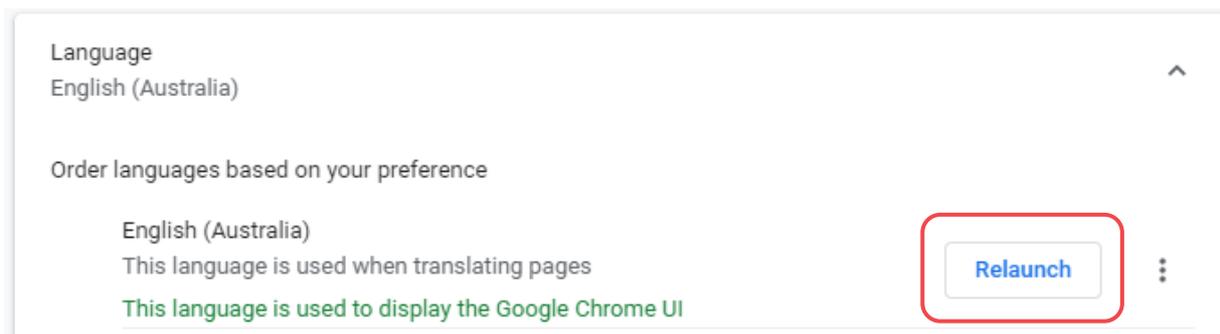
6. Locate and click on **English (Australia)** and then **Add** to apply.



7. Click on the  three dots icon against **English (Australia)** and select **Display Google Chrome in this language**.



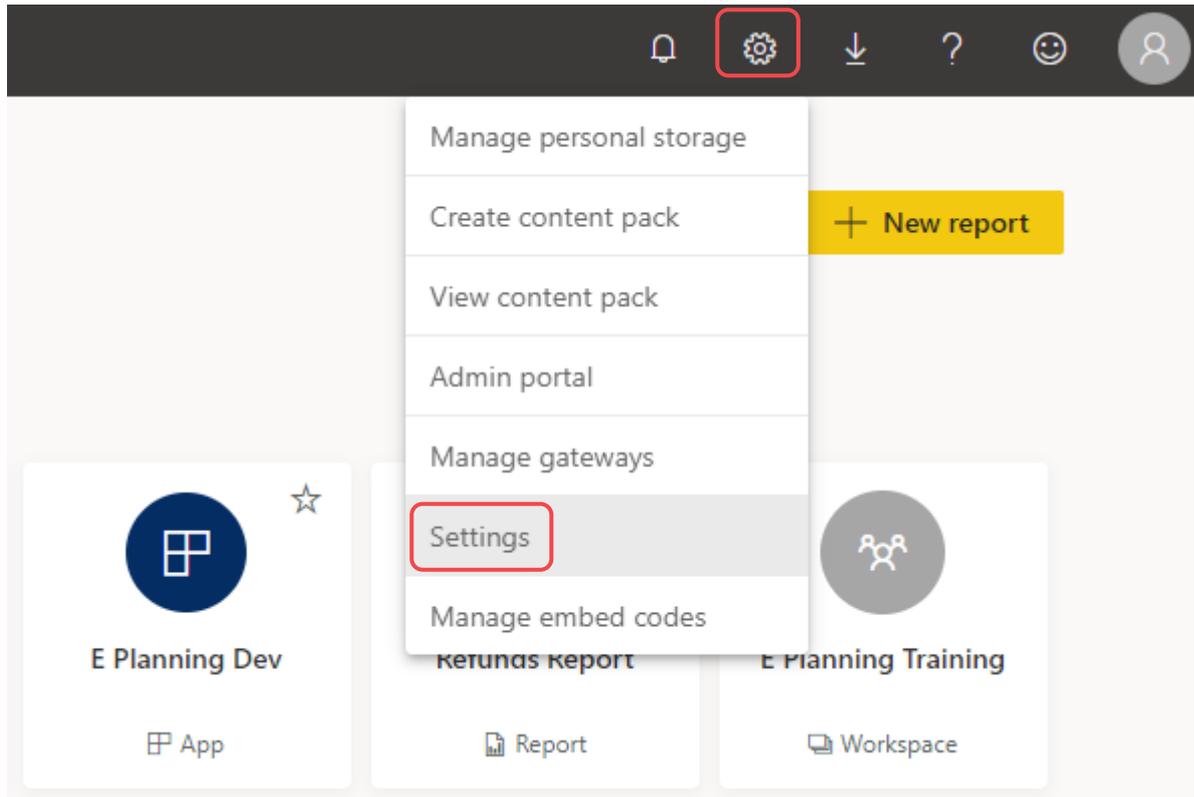
8. Click on **Relaunch** to refresh the Google Chrome browser and apply the change in the chosen language (this includes the date format in Power BI).



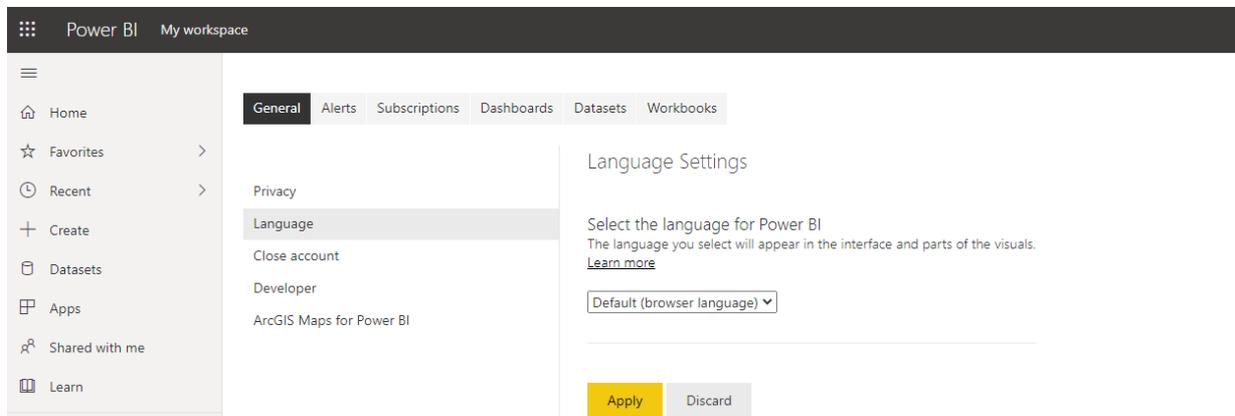
## Step 2 - Set Power BI language to match your internet browser

Open the **Council Financial Report Service** from PlanSA following the pathway: Our Planning System, and then PlanSA.

1. Click on the **Settings** icon and then select **Settings** from the drop-down menu.



2. Click on **Language** from the navigation menu.
3. Click on **Default (browser language)** and then **Apply** the language selected.



## Council Financial Reports

The council 'financial' reports have been developed for reconciling fee disbursements, reconciling over the counter fee payments, GST reporting, and managing fee refunds.

Refer to [Signing in](#) for instructions on signing in for the first time and on-going.

### Daily Till Report

This report displays payments processed over the counter by frontline council staff so that tills can be balanced at the end of each day.

### Refunds Report

This report shows information on refunds relating to the specific council running the report.

### Receipts Report

This report details the invoiced development application fees paid by the applicant, which is broken down by Fee (exclusive GST), GST and Total (inclusive GST) by fee owner (i.e. the Department, Relevant Authority) for development applications over a given period.

### Disbursement Report

This report shows disbursed invoiced fees grouped by application and fee total (inclusive GST) for the date range specified.

### RCTI Report

The Recipient Created Tax Invoice Report (RCTI) is a legislated GST compliance report showing all payments to which GST is applied to each agency, and GST amounts payable to the ATO.

## Council Application Management Reporting (Power BI)

Refer to [Signing in](#) for instructions on signing in for the first time and on-going.

### DAP Dashboard

This dashboard shows year-to-date application statistics for the 'State', i.e. total number submitted, total number lodged, and total number granted approval.

### Council Reports

<b>Numbers</b>	Shows year-to-date development application statistics.
<b>DA</b>	Shows the development applications lodged on a map and in a table format.
<b>Consents</b>	Shows the number of consents on a map and in a table format.
<b>Accessibility</b>	Shows applicant lodging applications behaviour; what days of the week and time of day.
<b>Performance DAs</b>	Shows number of days to make a decision.
<b>Performance Consents</b>	Shows average days taken by consent type.
<b>Elements</b>	Shows the elements assessed on a map and graph.
<b>Zones</b>	Shows types of applications, i.e. Crown, Essential Infrastructure, Exempt, Impact Assessed, Code Assessed and Accepted, broken down by zones.
<b>Planning Consents</b>	Shows planning consent information.
<b>Building Consents</b>	Shows total number of building consents.
<b>Land Division Consents</b>	Shows total number of land division consents.
<b>Planning and Land Division Consents</b>	Shows total number of planning and land division consents.
<b>Statistics</b>	Shows development application statistics and responses for further information.

<b>Indicators Reports</b>	<b>Snapshot</b>	Shows application submissions and total development costs by date submitted.
	<b>Applications</b>	Shows a breakdown of applications submitted by development category, element type and category, and the average number of days taken to grant/refuse development approval.
	<b>Fee</b>	Shows the total development cost vs. total fees collected, broken down by application status (i.e. submitted, lodged, etc.), payment method used, and fee type.
	<b>Consents granted vs. refused</b>	Shows a breakdown of the average number of days to make a decision and by issuing relevant authority (i.e. Assessment Manager, accredited professional, the SPC, or other).
	<b>Building Consents</b>	Shows building consent decisions (i.e. granted or refused) broken down by council and private accredited professional.
	<b>Planning Consents</b>	Shows planning consent decisions (i.e. granted or refused) broken down by development category and issuing relevant authority (i.e. Assessment Manager, accredited professional, the SPC, or other).
	<b>Planning and Land Division Consents</b>	Shows planning and land division consents broken down by issuing relevant authority (i.e. Assessment Manager, accredited professional, the SPC, or other).
	<b>Land Division Consents</b>	Shows land division consents broken down by issuing relevant authority (i.e. Assessment Manager, accredited professional, the SPC, or other).

<b>Workload Analysis Report</b>	<b>Relevant Authority Reason Report</b>	Lists open applications and reason for being the correct Relevant Authority.
	<b>End of Operative Date Report lists</b>	Lists applications with consents that have reached the end of their operative period.
	<b>Mandatory Building Notifications Report</b>	Lists building notifications grouped by stage and then building / building work requiring an inspection (indicated as – yes, no, either)
<b>DAs Awaiting Payment</b>	Shows a list of development applications awaiting payment.	
<b>Inspections Report Council</b>	<b>Inspections Compliance</b>	The dashboard to track the number of inspections completed versus the percentage required in Practice Direction 8 and 9.
	<b>Inspections Register</b>	Shows a listing of completed and pending inspections, including infographics for Inspection status, Inspection Status of building notifications, Number of inspections by building classification, and Inspection outcome.
	<b>Adhoc Inspections</b>	Shows a listing of completed and pending inspections, including infographics for Inspection status, Number of inspections by building classification, and Inspection outcome.
	<b>Inspection Location</b>	Graphically showcases the location of completed and pending inspections, number of inspections performed by an inspector, and a percentage breakdown by inspection outcome, i.e. not recorded, unsatisfactory, satisfactory.

## Development Application Processing Reports

The 'Development Application Processing Reports' have been developed to manage application allocations, statutory timeframes to complete an action (i.e. verification, public notification, make a decision), manage referral requests, and response timeframes.

### Information!

Within the Reporting service the link to the 'Council Application Management Reporting (Power BI)' is available.

#### Unallocated Applications

This report displays the list of applications/consents without an allocated assessor.

#### Allocated Applications

This infographic displays applications with an allocated staff member by consent type (i.e. Planning, Land Division, and Building) and by Development Approval.

#### Days left in Verification

This report displays the list of applications with 5 business days or less left in the verification stage.

#### Public Notification Days Left

This report displays a list of applications with 5 business days or less left on public notification.

#### Days Left Until Decision

This report displays the list of applications with 5 business days or less remaining for a decision to be made (post-lodgment).

#### Referral Agency Response Days Left

This report displays a list of referrals with 5 business days or less left for the referral agency to respond.

#### Relevant Authority Referral Response Days Left

This report displays a list of applications with 2 business days or less left for relevant authority to respond to referral(s). It displays the list of internal referrals within a relevant authority entity.

#### Inspection Allocated Applications

This infographic displays application inspections with an allocated staff member.

### 3. Signing in

#### First time signing in

When signing in for the first time Microsoft verifies whether or not you already have an account. If the verification identifies that you do not have an account then contact the PlanSA Service Desk at [PlanSA@sa.gov.au](mailto:PlanSA@sa.gov.au) for assistance.

Option 1: **Login to the Finance Reporting** within the PlanSA portal using the following pathway [Our Planning System > PlanSA > Council Financial Report Service](#).

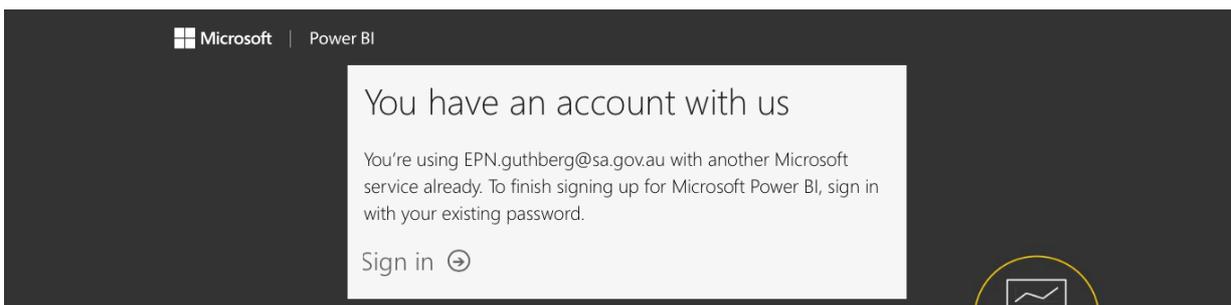


Option 2: Login to the **Council Application Management Reporting (Power BI)** from the Reporting feature within the DAP system.



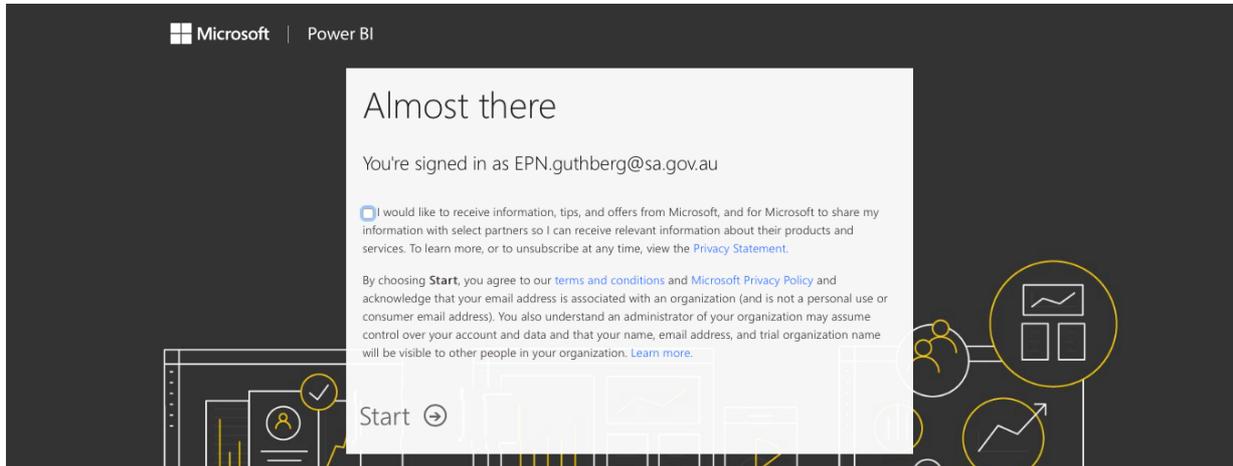
The first time you sign in, Microsoft verifies whether or not you already have an account. In the example below, an existing account was detected.

1. Click on **Sign in**.



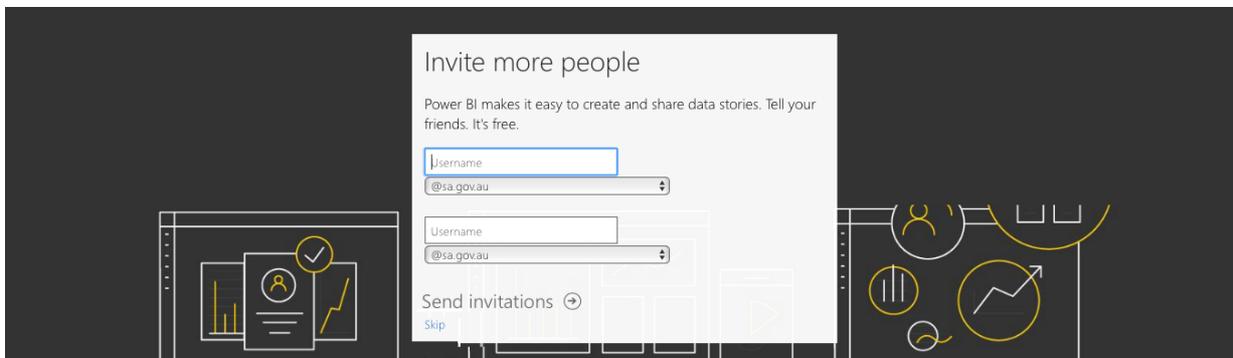
Now you can review the terms and conditions; and select the check box if you agree.

2. Click on **Start** to proceed.



The 'Invite more people' option is not required as part of logging in for the first time.

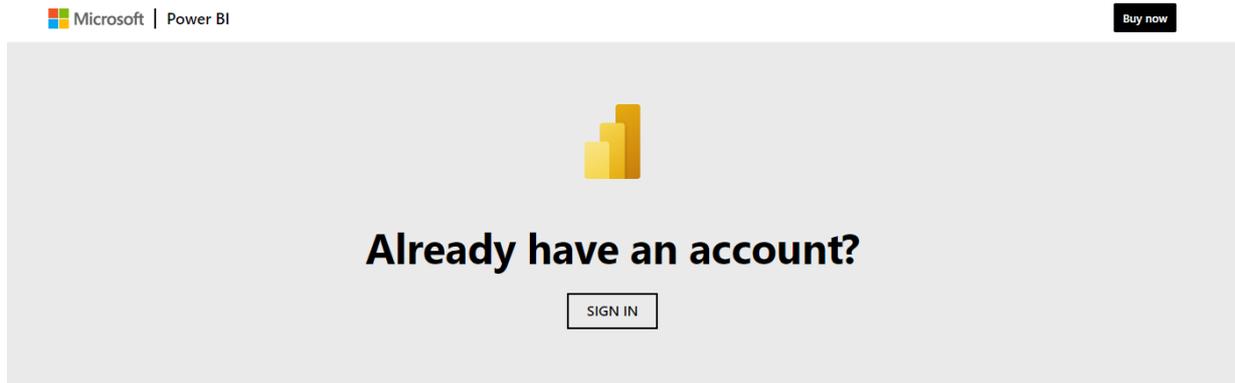
3. Click on **Skip** to proceed.



## Signing in

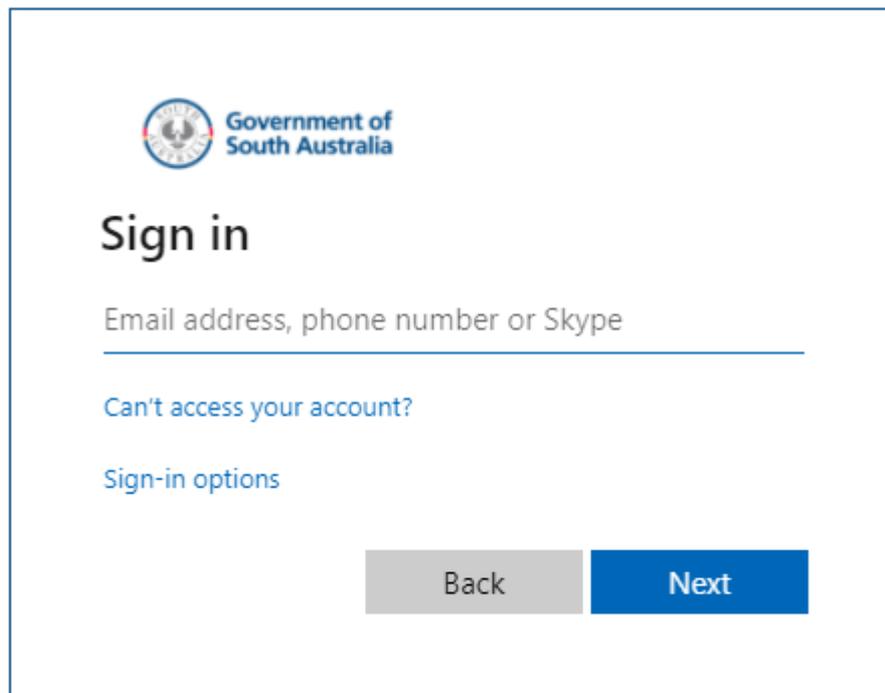
On opening the **Council Financial Report Service** from the PlanSA portal or the **Council Application Management Reporting (Power BI)** from the DAP system 'Reporting' feature, the 'Microsoft Power BI – Already have an account?' page is shown.

1. Click on **Sign In** to continue.

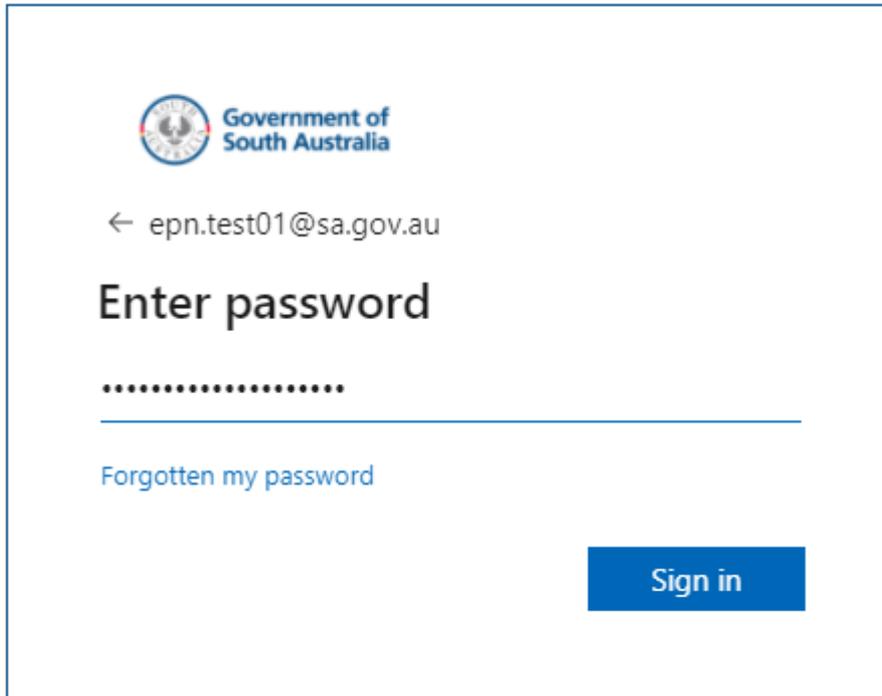


The Microsoft Sign in window shows.

2. Enter your **user account** for the ePlanning platform and click **Next** to continue.



3. Enter the **password** for your user account and then **Sign in**.



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← epn.test01@sa.gov.au

## Enter password

.....

[Forgotten my password](#)

**Sign in**

The Microsoft **'Stay signed in?'** window shows.

4. Tick the **'Don't show this again'** and then **Yes** to keep signed in to your account.



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epn.test01@sa.gov.au

## Stay signed in?

Do this to reduce the number of times you are asked to sign in.

Don't show this again

No Yes

## Switch between the Power BI App. reporting dashboards

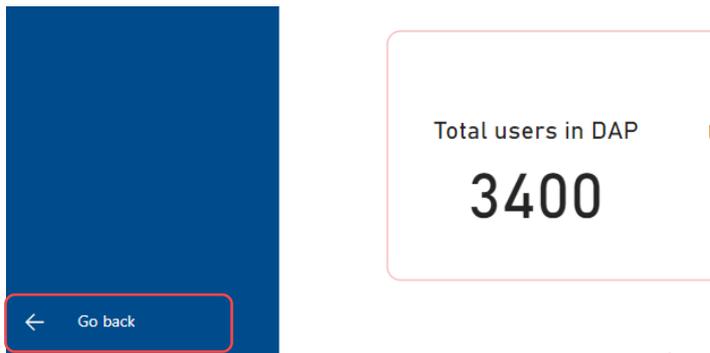
When you have access to both the 'Council Financial Report Service' and the 'DAP Reporting Service' you have the ability to move between each reporting service within the Power BI app.

### Access council financial reports from the Council application Management Reporting page

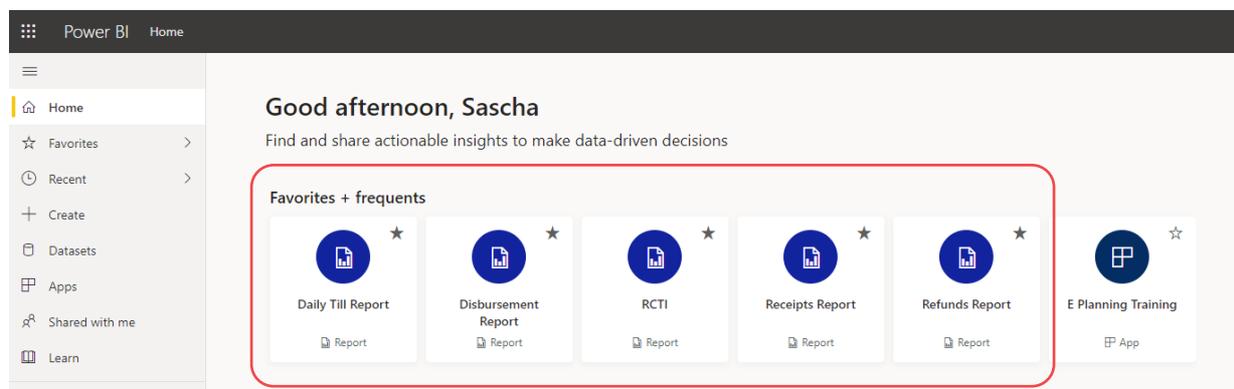
1. Open the **Council Application Management Reporting (Power BI)** from the DAP Reporting tool.



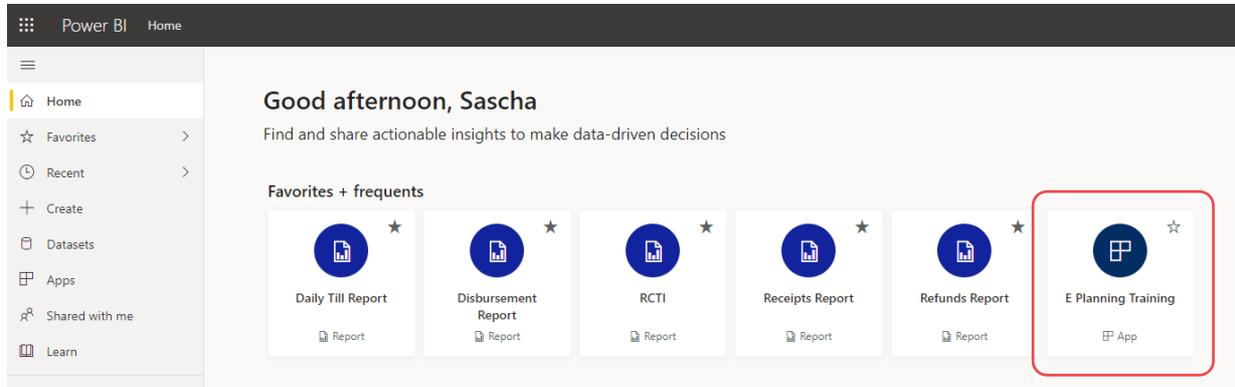
2. Click ← **Go back** located at the bottom of the left hand side menu navigation.



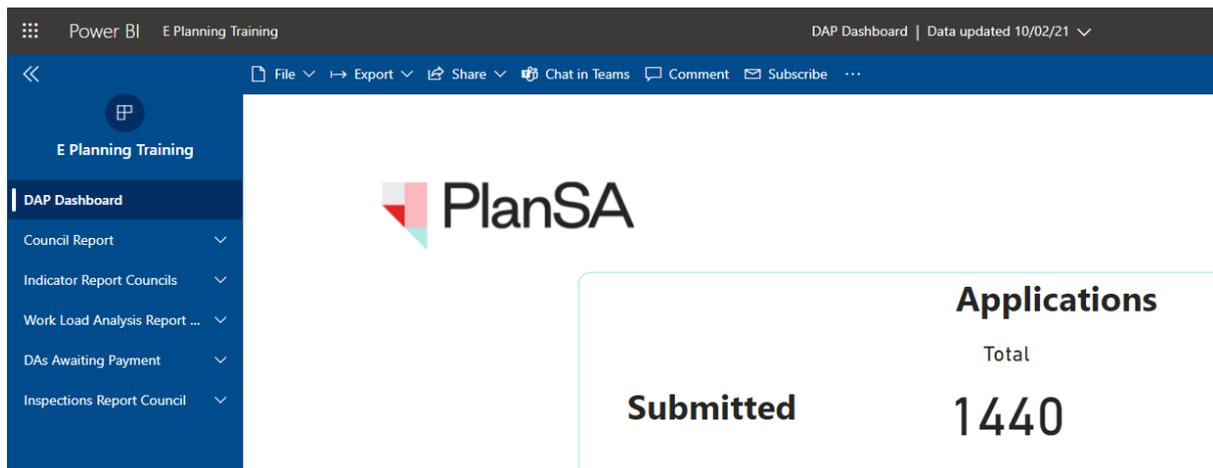
The **Power BI Home** page shows with your favourite and frequent financial reports showing.



- To return to the **Council Application Management Reporting** click on the **E Planning App** within the **Power BI Home** page.



The **Council Application Management Reporting** page shows.



## 4. Council Financial Reporting

The council 'financial' reports have been developed for reconciling fee disbursements, reconciling over the counter fee payments, GST reporting, and managing fee refunds.

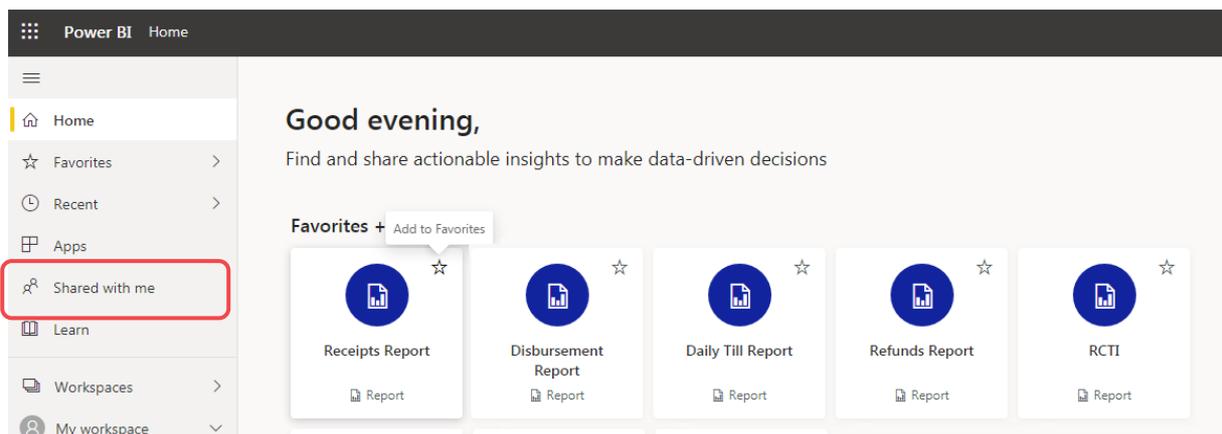
Refer to [Council Financial Reports](#) to understand the purpose of each report.

### Access the Council Financial Reporting

1. **Login to the Finance Reporting** within the PlanSA portal using the following pathway [Our Planning System > PlanSA > Council Financial Report Service](#).
2. Click on **Login to the Financial Report Service** within the Council Financial Report Service page of the PlanSA portal.
3. Complete the [First time signing in](#) instructions; or if returning, complete the [Signing in](#) instructions.
4. Within the Home page click on **Shared with me** to view the reports.

### Information!

To 'add a report as a favourite' click on the ★ **Star** icon against a report. The report will then show within the **Home** page and the **Favourites** menu option.



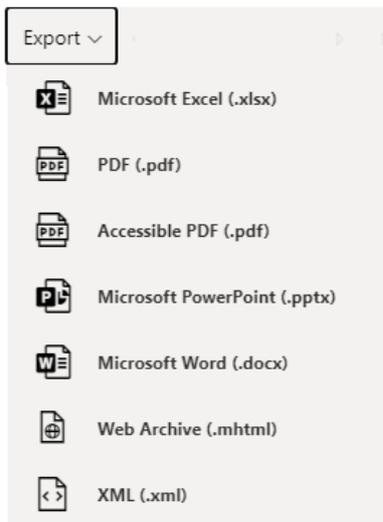
5. Click on the report name to run.



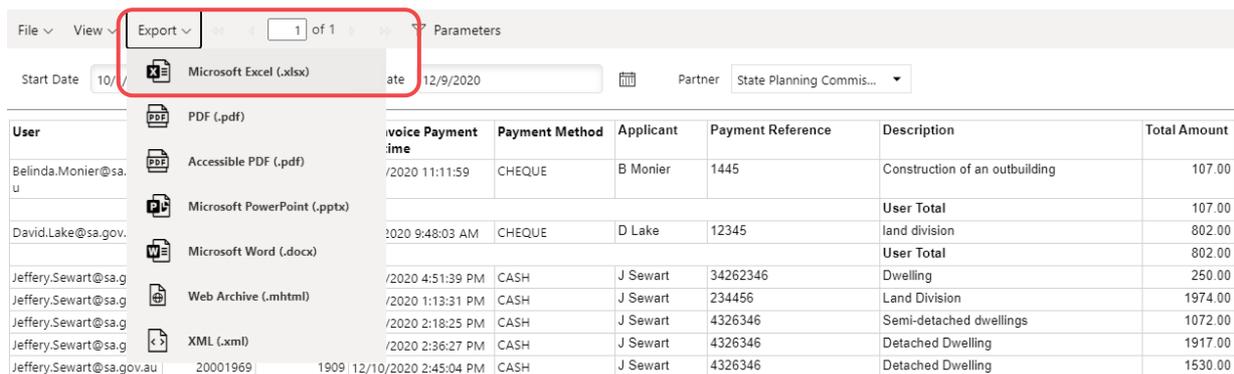
## Exporting the Report Data into Microsoft Excel

To further analyse the report data, use the **Export** feature to access the available output options. Typically, the **Microsoft Excel** option is used to sort and filter the report data.

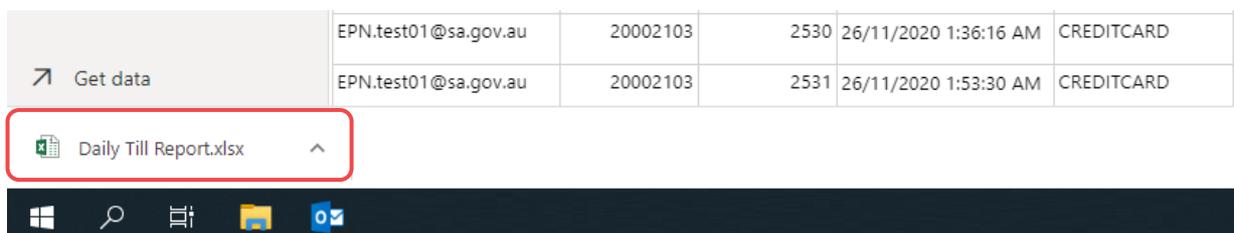
These instructions are to be followed for the 'Council Financial Reports'. To expose and export data from the 'Council Application Management Reporting (Power BI)', refer to the instructions on how to [Export the data used to create a visualisation](#).



1. Generate the required report. In this example, the 'Daily Till Report' has been run.
2. Click on **Export** from the reporting Tool bar and then **Microsoft Excel (.xlsx)**.



3. Click on the **report download** to open in the applicable application, i.e. Microsoft Excel.



## Running the Daily Till Report

<b>Purpose</b>	At the close of the day run the 'Daily Till Report' to list the development application fees paid over the counter and confirm the amounts taken against the physical payment. The report can also be attached with other financial / banking reports as required.
<b>Frequency</b>	Daily

### How to run the Daily Till Report

1. Click on **Daily Till Report**.

**Information!**  
The Daily Till Report will show data for the default date range (if available).

2. Leave **Start Date** default of 'today's' date or use the calendar to choose another date.
3. Leave **End Date** default of 'today's' date or use the calendar to choose another date.

File ▾ View ▾ Export ▾ 1 of 1 Parameters

Start Date   End Date  

4. The **Partner** defaults with the council name and cannot be edited.
5. Click on **View report** to run.

The Daily Till Report shows over the counter payments for the date range specified.

File ▾ View ▾ Export ▾ 1 of 1 Parameters Print Comments Subscribe

Start Date   End Date   Partner  View report

User	Application ID	Tax Invoice Number	Tax Invoice Payment date time	Payment Method	Applicant	Payment Reference	Description	Total Amount
Troy.Fountain@sa.gov.au	20002173	2170	4/12/2020 2:49:03 PM	CASH	T Fountain	12345	I want building a nice house and deck and a really big pool	557.50
Troy.Fountain@sa.gov.au	20002175	2172	7/12/2020 2:51:34 PM	CASH	T Fountain	12345	I am wanting to building a really nice place in penong and a wooden deck and deep pool	1779.50
							<b>User Total</b>	2337.00
							<b>Grand Total</b>	2337.00

6. Click on **File** and choose **Print** to print a copy of the report, or click on **Export** to view the report data in Microsoft Excel.

## Running the Refunds Report

### Purpose

To identify fee refunds that are:

- initiated and not yet approved
- to be paid from council financial systems.

### Frequency

Weekly

## How to run the Refunds Report

1. Click on **Refunds Report**.

### Information!

The Refunds Report will show data for the default date range (if available)

2. Leave **Start Date** default of 'today's' date or use the calendar to choose another date.
3. Leave **End Date** default of 'today's' date or use the calendar to choose another date.

The screenshot shows a software interface for running a report. At the top, there are menu options: File, View, Export, and Parameters. Below these, there are two date input fields. The first is labeled 'Start Date' and contains the text '8/3/2020'. The second is labeled 'End Date' and contains the text '8/31/2020'. Both fields have a calendar icon to their right. In the center, there is a page indicator showing '1 of 1'.

4. The **Partner** defaults with the council name and cannot be edited.
5. Click on **View report** to run.

The Refunds Report shows application fees refunded for the date range specified.

Application ID	Invoice ID	Invoice Line Item ID	Refund Date Time	Fee Advice Date	Applicant	Payment Type	Refund Status	Description	Fee Type	Fee	GST	Total
1	20000237	1595	2931 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Hard copy	80.00	0.00	80.00
2	20000237	1595	2932 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Performance Assessed	250.00	0.00	250.00
3	20000237	1595	2933 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Impact Assessed (EIS) Assessment	25.00	0.00	25.00
4	20000237	1595	2934 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	398.00	0.00	398.00
5	20000237	1595	2935 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	222.00	0.00	222.00
6	20000237	1595	2936 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	398.00	0.00	398.00
7	20000237	1595	2937 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	398.00	0.00	398.00
8	20000406	1597	2947 3/08/2020 7:01:23 AM	3/08/2020 3:32:31 PM	T Applicant	EFT		Proposed Use for ExempiPizzaOven	Deemed to Satisfy	90.91	9.09	100.00

6. Click on **File** and choose **Print** to print a copy of the report, or click on **Export** to view the report data in Microsoft Excel.

## Running the Receipts Report

### Purpose

The information will assist with reconciling the 'weekly' disbursed fee amount against the application fees invoiced.

### Frequency

3 times per week

## How to run a Receipts Report

1. Click on **Receipts Report**.

### Information!

The Receipts Report will show data for the default date range (if available).

2. Leave **Start Date** default of 'today's' date or use the calendar to choose another date.
3. Leave **End Date** default of 'today's' date or use the calendar to choose another date.

File View Export 1 of ? Parameters

Start Date 12/1/2020 End Date 12/8/2020

4. The **Partner** defaults with the council name and cannot be edited.
5. Click on **View report** to run.

The Receipts Report shows itemised development application fees paid by fee type for the date range specified.

Application ID	Invoice ID	Invoice Line Item ID	Refund Date Time	Fee Advice Date	Applicant	Payment Type	Refund Status	Description	Fee Type	Fee	GST	Total
1	20000237	1595	2931 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Hard copy	80.00	0.00	80.00
2	20000237	1595	2932 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Performance Assessed	250.00	0.00	250.00
3	20000237	1595	2933 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Impact Assessed (EIS) Assessment	25.00	0.00	25.00
4	20000237	1595	2934 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	398.00	0.00	398.00
5	20000237	1595	2935 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	222.00	0.00	222.00
6	20000237	1595	2936 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	398.00	0.00	398.00
7	20000237	1595	2937 3/08/2020 7:00:38 AM	3/08/2020 3:26:32 PM	T Applicant	BPOINT	Approved	Referral Agency Team Leader	Standard	398.00	0.00	398.00
8	20000406	1597	2947 3/08/2020 7:01:23 AM	3/08/2020 3:32:31 PM	T Applicant	EFT		Proposed Use for ExemptPizzaOven	Deemed to Satisfy	90.91	9.09	100.00

6. Click on **File** and choose **Print** to print a copy of the report, or click on **Export** to view the report data in Microsoft Excel.

## Running the Disbursement Report

### Purpose

The information will assist with reconciling the 'weekly' disbursed fee amount against the application fees invoiced.

### Frequency

3 times per week

## How to run a Disbursement Report

1. Click on **Disbursement Report**.

### Information!

The Disbursement Report will show data for the default date range (if available).

2. Leave **Start Date** default of 'today's' date or use the calendar to choose another date.
3. Leave **End Date** default of 'today's' date or use the calendar to choose another date.

File ▾ View ▾ Export ▾ << < 1 of ? > >> Parameters

Start Date   End Date  

4. The **Partner** defaults with the council name and cannot be edited.
5. Click on **View report** to run.

The Disbursement Report shows disbursed invoiced fees grouped by application and fee total (incl. GST) for the date range specified.

Start Date   End Date   Partner Name   View report

Application ID	Invoice ID	Disbursement ID	Voucher Header	Line Item ID	Fee Category	Description	Total
20001672	1990	6085	OTC Lodgement Fees	3596	Lodgement	Electronic Lodgement Fee	-177.00
20001673	1991	6086	OTC Lodgement Fees	3597	Lodgement	Electronic Lodgement Fee	-177.00
20001675	1998	6096	OTC Lodgement Fees	3605	Lodgement	Electronic Lodgement Fee	-177.00
20001676	1992	6087	OTC Lodgement Fees	3598	Lodgement	Electronic Lodgement Fee	-177.00
20001677	1993	6088	OTC Lodgement Fees	3599	Lodgement	Electronic Lodgement Fee	-177.00
20001678	1994	6089	OTC Lodgement Fees	3600	Lodgement	Electronic Lodgement Fee	-177.00
		6091	OTC Referral Agency Fees	3601	Heritage	Standard	-398.00

6. Click on **File** and choose **Print** to print a copy of the report, or click on **Export** to view the report data in Microsoft Excel.

## Running the RCTI

### Overview

The Recipient Created Tax Invoice Report (RCTI) is a legislated GST compliance report showing all payments to which GST is applied to each agency, and the GST amounts payable to the ATO.

### Frequency

Monthly

## How to generate the RCTI

1. Click on **RCTI**.
2. Leave the **Month** as the default 'current' month or select a month in the past using the calendar.

### Information!

The RCTI will show data for the default month (if available)

File ▾ View ▾ Export ▾ 1 of 1

Select Month Nov 2020 ▾

3. The **Partner** defaults with the council name and cannot be edited.
4. Click on **View report** to run.

File ▾ View ▾ Export ▾ 1 of 1 Parameters Print Comments Subscribe

Select Month Nov 2020 Partner City of Adelaide View report

**PlanSA**

Recipient created tax invoice

Report Date: 8/12/2020  
Report Month: November 2020

**From - Recipient:**

Name	Department of Planning, Transport and infrastructure		
Address	GPO Box 1815		
Suburb/Town	State/Territory	Postcode	
Adelaide	SA	5000	
Australian business number (ABN)	92 366 288 135		

**To-Supplier:**

Name	City of Adelaide		
Address	11 Waymouth Street		
Suburb/Town	State/Territory	Postcode	
Adelaide	SA	5066	
Australian business number (ABN)	00 000 000 000		

**SUPPLIES MADE BY SUPPLIER TO RECIPIENT**

Description of taxable supplies

Invoice ID	Description	Value	GST	Price
2293	Building Assessment - Class 1	681.82	68.18	750.00
2293	Building Assessment - Classes 2-9	1490.91	149.09	1640.00

5. Click on **File** and choose **Print** to print a copy of the report, or click on **Export** to view the report data in Microsoft Excel.

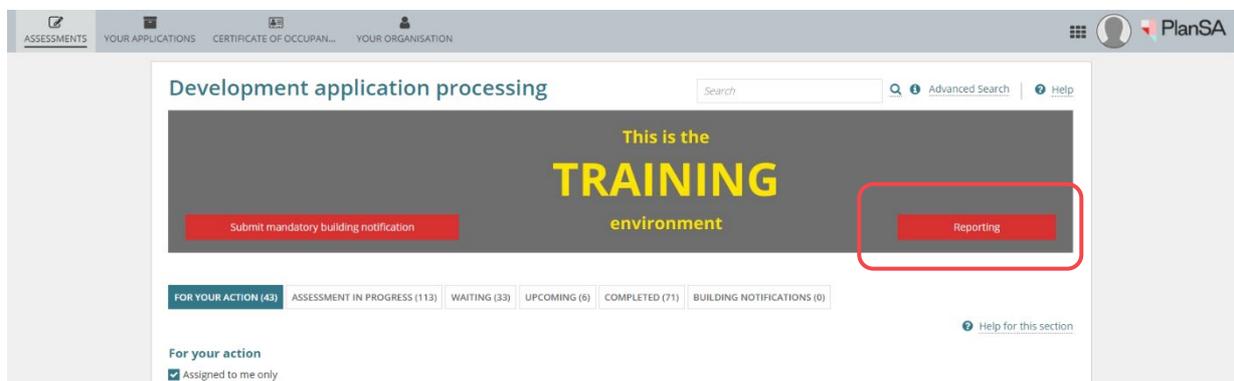
## 5. Council Application Management Reporting

The Council Application Management Reporting (Power BI) is available from the **Assessments** dashboard and the **Reporting** feature.

Refer to [Council Application Management Reporting \(Power BI\)](#) for a description of each report.

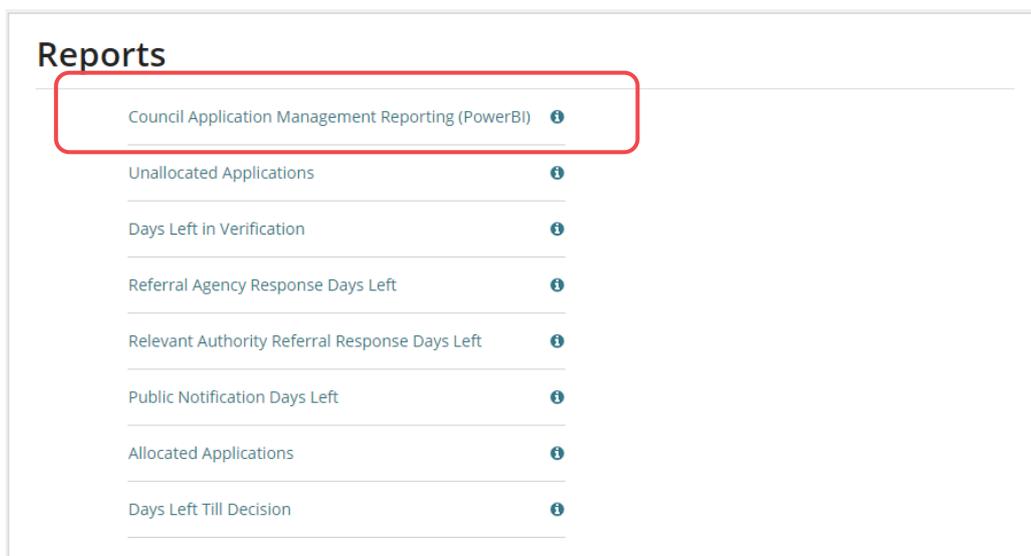
### Access the Council Application Management Reporting

1. Click on **Reporting**.



The **Reports** page displays a list of the development application reports and the link to access the 'Council Application Management Reporting (Power BI)'.

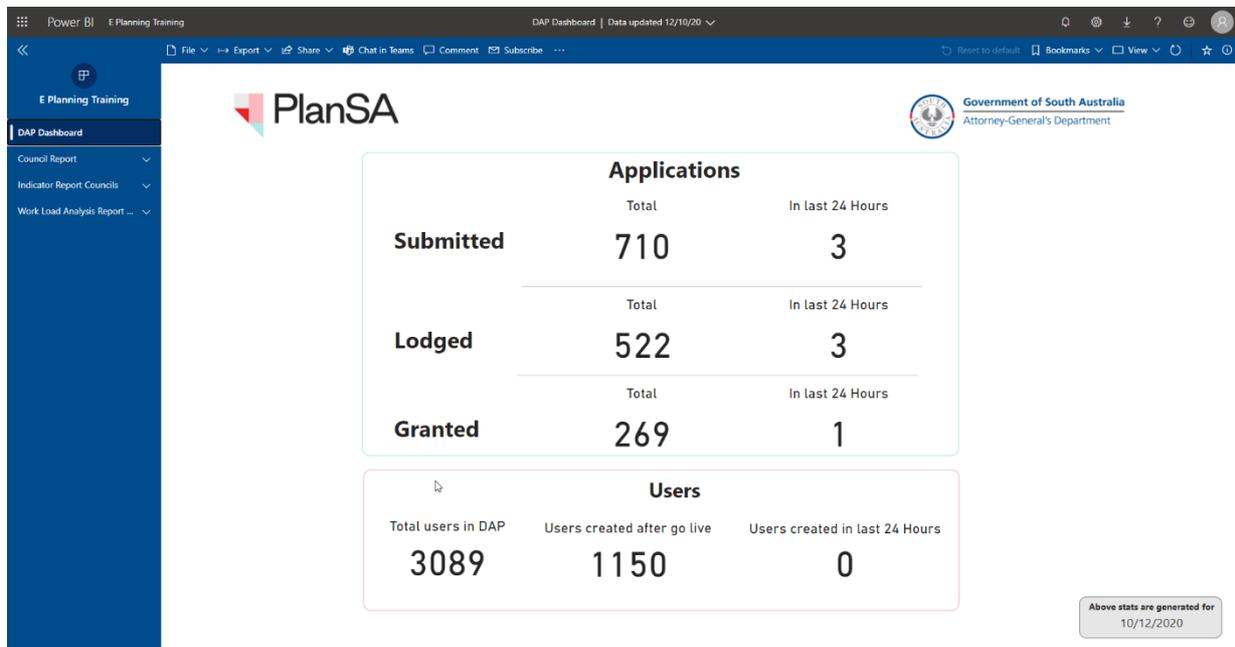
2. Click on **Council Application Management Reporting (Power BI)**.



3. Complete the [First time signing in](#) instructions; or if returning, complete the [Signing in](#) instructions.

## Navigate the Desktop Report Viewer

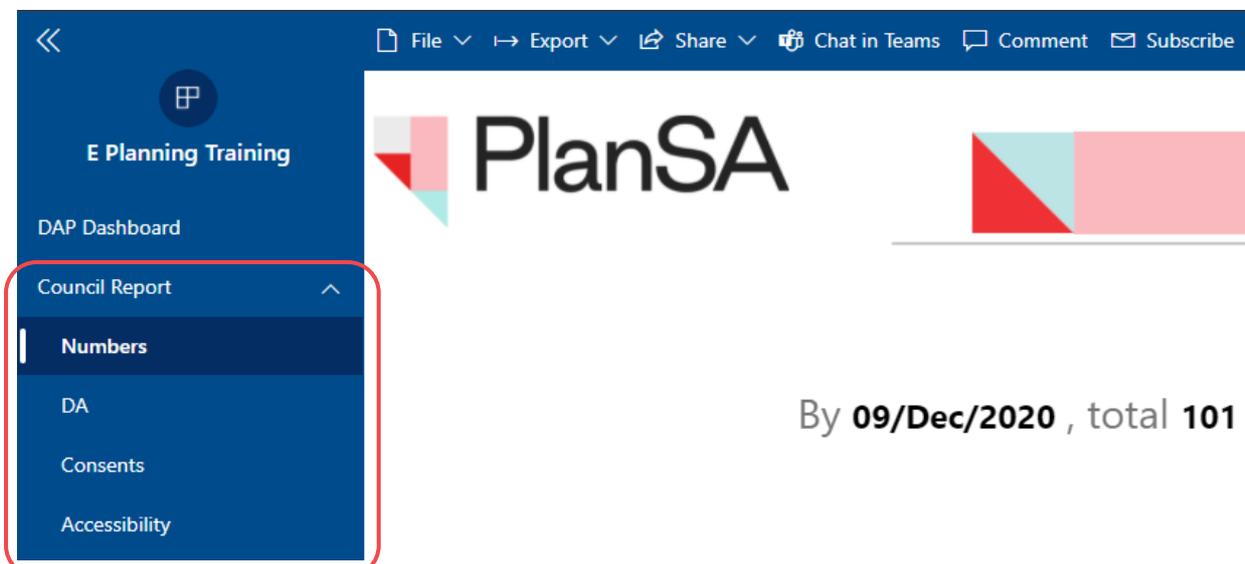
On first entering the Desktop Report Viewer the **DAP Dashboard** currently shows the year to date application and user statistics for rural and outback areas in South Australia.



The report navigation panel on the left hand side shows 1 dashboard and 3 reporting categories:

- DAP Dashboard
- Council Report
- Indicator Report Councils
- Work Load Analysis Report

Click on the reporting category to expand and show the full list of reports; to collapse (i.e. hide) the reporting category, click on it again.



## Sort the data within a reporting table

**Report:** Council Report > DA (Development Application)

The table headings can be used to change how the application information is sorted; numerically (i.e. in ascending or descending order) or alphabetically (i.e. A-Z or Z-A).

### Information!

When the **Export data** function is performed, the records exported remain in the sorted order shown on the screen.

1. Click on the column heading to sort numerically or alphabetically. For this example, the table will be sorted by **Status** in ascending order (i.e. A-Z).

Current status of all DAs in your council

Number of DA 101	Information Requested	Submitted	Lodged	Not Required	Refused	Granted	Withdrawn	Cancelled	Processing
	0	25	58	0	1	13	4	0	0

DA ID	Dev Number	Submission Date	Lodge Date	Development Category	Status	Estimated Dev Cost
20001584		8/21/2020 2:38:26 PM			Submitted	\$60,000.00
20001653		8/24/2020 3:12:24 PM			Submitted	\$123,456.00
20001655		8/25/2020 1:42:01 PM			Submitted	\$230,000.00
20001659		8/26/2020 11:18:25 AM			Submitted	\$300,000.00
20001679		8/27/2020 10:23:04 PM			Submitted	\$300,000.00
20001686		8/28/2020 1:47:20 PM			Submitted	\$200,000.00
20001700		9/3/2020 11:53:23 AM			Submitted	\$200,000.00
20001701		9/3/2020 12:04:12 PM			Submitted	\$12,345.00
20001741		9/10/2020 11:19:10 AM			Submitted	\$1.00
20001742		9/10/2020 1:27:41 PM		Deemed to Satisfy	Submitted	\$111.00
20001770		9/14/2020 9:16:44 AM		Deemed to Satisfy	Submitted	\$50,000.00

2. Click on the **Status** column heading again to change the order to descending (i.e. Z-A).

Current status of all DAs in your council

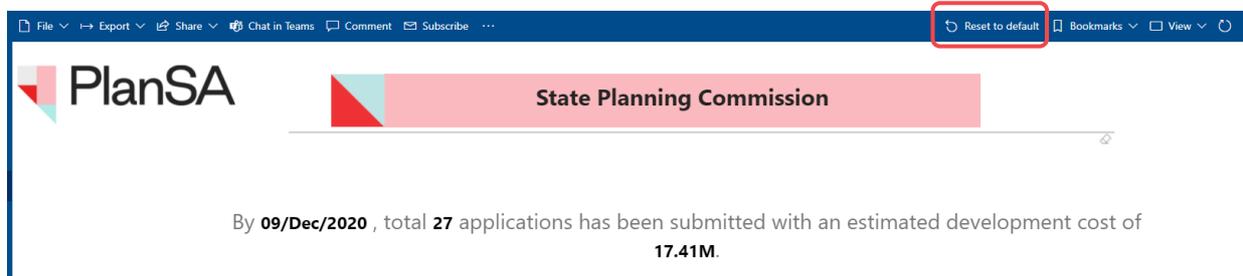
Number of DA 101	Information Requested	Submitted	Lodged	Not Required	Refused	Granted	Withdrawn	Cancelled	Processing
	0	25	58	0	1	13	4	0	0

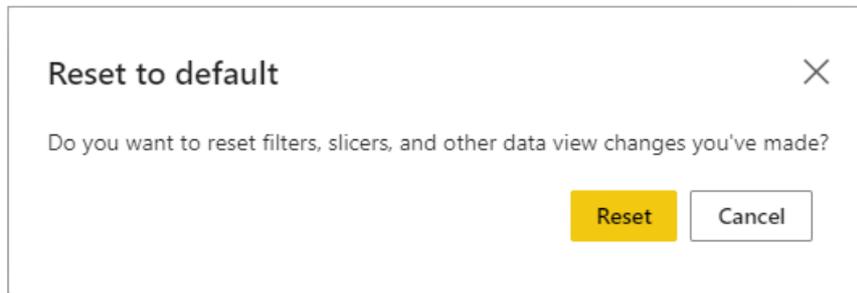
DA ID	Dev Number	Submission Date	Lodge Date	Development Category	Status	Estimated Dev Cost
20001557		8/18/2020 1:24:06 PM	18/08/2020	Performance Assessed	Withdrawn	\$100,000.00
20001647	010/D605/20	8/24/2020 8:16:34 AM	24/08/2020	Accepted	Withdrawn	\$500,000.00
20001661		8/26/2020 3:01:35 PM	26/08/2020	Performance Assessed	Withdrawn	\$200,000.00
20001689		8/31/2020 11:40:25 AM			Withdrawn	\$35,000.00
20001628		8/23/2020 2:23:55 PM	14/09/2020	Accepted	Granted	\$250,000.00
20001645		8/24/2020 7:38:40 AM	24/08/2020	Accepted	Granted	\$123,456.00
20001651		8/24/2020 12:23:45 PM	26/08/2020	Accepted	Granted	\$100,000.00
20001654		8/25/2020 11:58:37 AM	10/09/2020		Granted	\$1,111,111.00

## Reset report data

1. The  **Reset to default** button can be used to reset the report data. It is located within the toolbar.



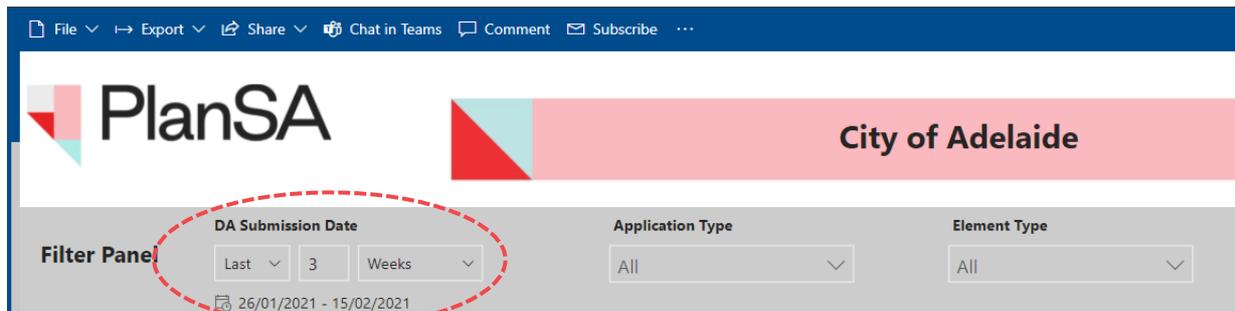
2. Click on **Reset** in the Reset to default window.



## Show data for a given period

**Report:** Council Report > Elements

The period filter can be used to change the statistical information presented in tables and the visualisation graphics.



To use the period filter select a combination using the three field options provided.

Some working filter combination examples:

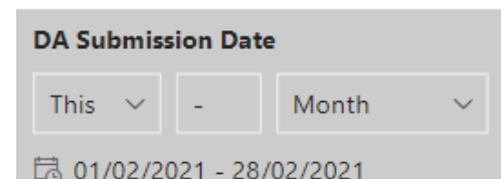
### Show Last Month's Data

Set the period filter to **Last** and **1** and **Months**



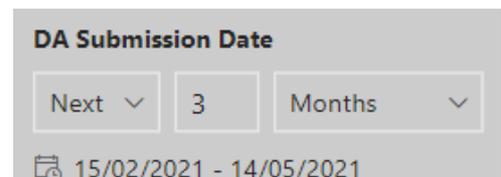
### Show this week's data

Set the period filter to **This** and **blank number** and **Month**



### Show next month's data

Set the period filter to **Next** and **3** and **Months**



## Export the data used to create a visualisation

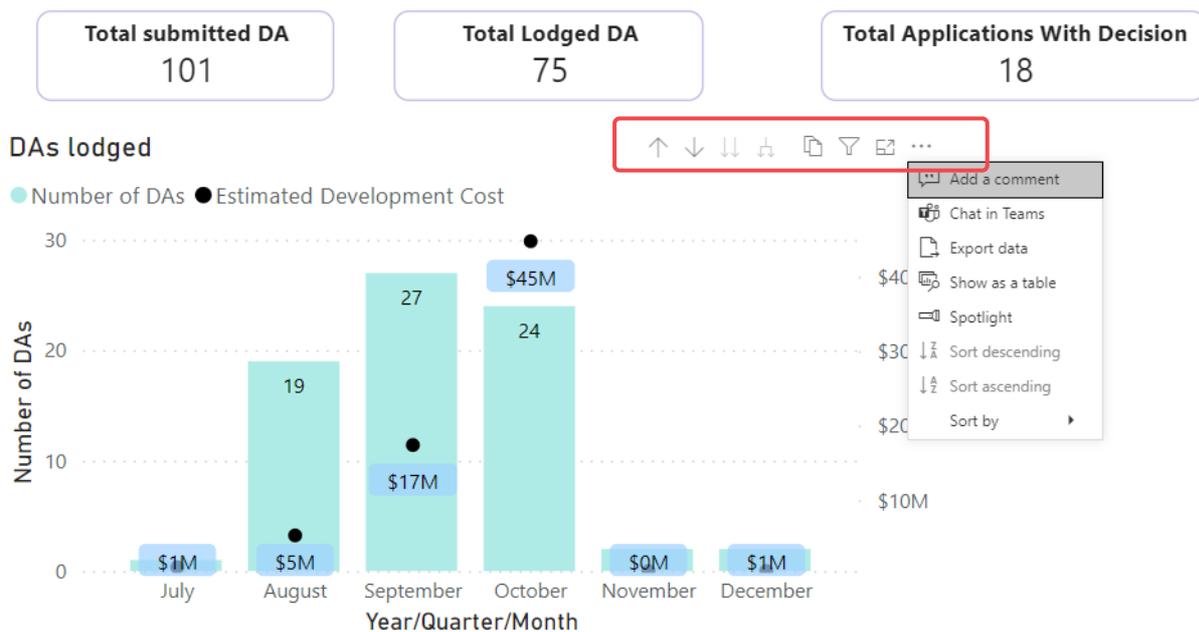
To analyse the visualisation data (i.e. graph or table) in Microsoft Excel or to import into your own reporting tool to create your own reporting and data visualisation, follow the below instructions or [learn more](#).

Note: not all graphs have the Export Data capability, the table in these instances will be the data source.

**Report:** Council Report > Numbers

1. Move cursor over the report table, graphic or total to show the tool bar.
2. Click on the  **three dots** to show the menu.
3. Click on **Export Data**.

Note: if you have filtered the visualisation (i.e. graph, table etc.), when the data is exported it displays as per the filter(s) applied.



The **Export data** window shows.

### Export data ✕

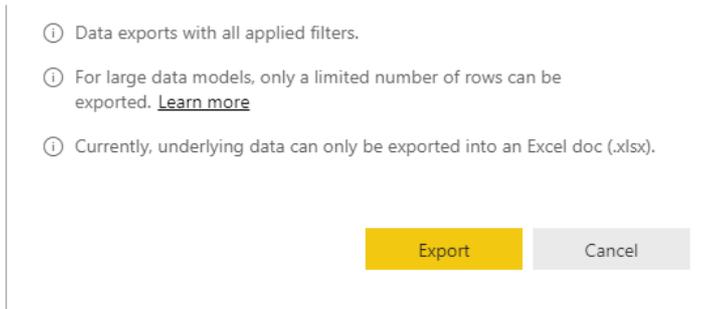
Which data would you like to export?

Summarized data  
 Underlying data

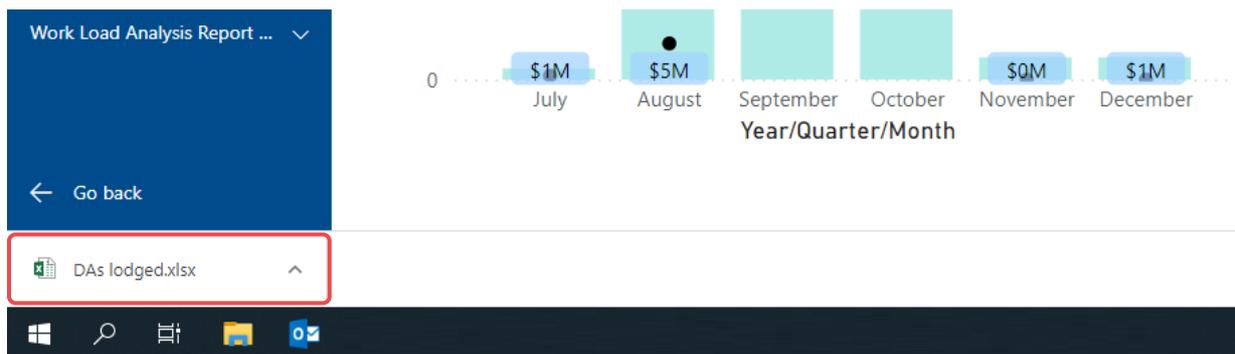
File format:

.xlsx (Excel 150,000-row max) ▼

4. Select **Underlying data** to change the data to export.
5. Leave **File Format** default of Excel 150,000 row max.
6. Click **Export** to complete the action.



7. Click on the **report download** to open in the applicable application, i.e. Microsoft Excel.

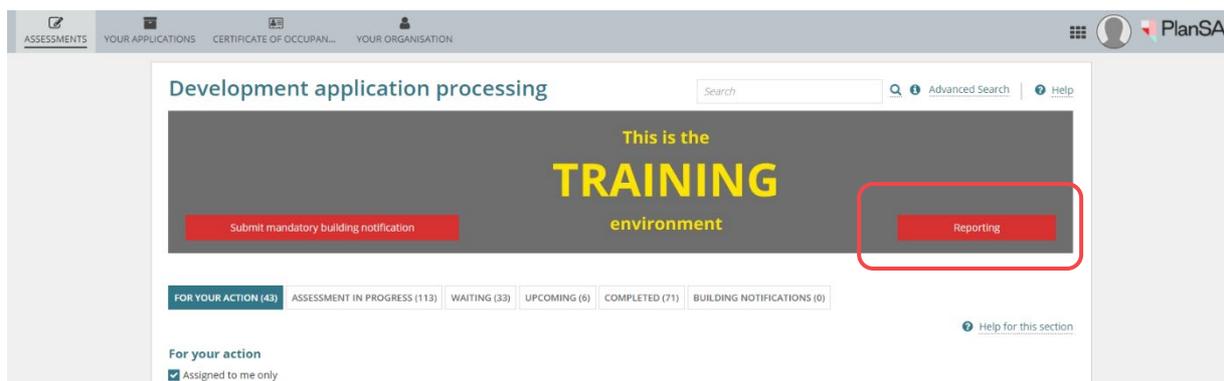


## 6. Development Application Reporting

Available from the **Assessments** dashboard is the **Reporting** feature that contains reports for managing development application timeframes and workload allocation management.

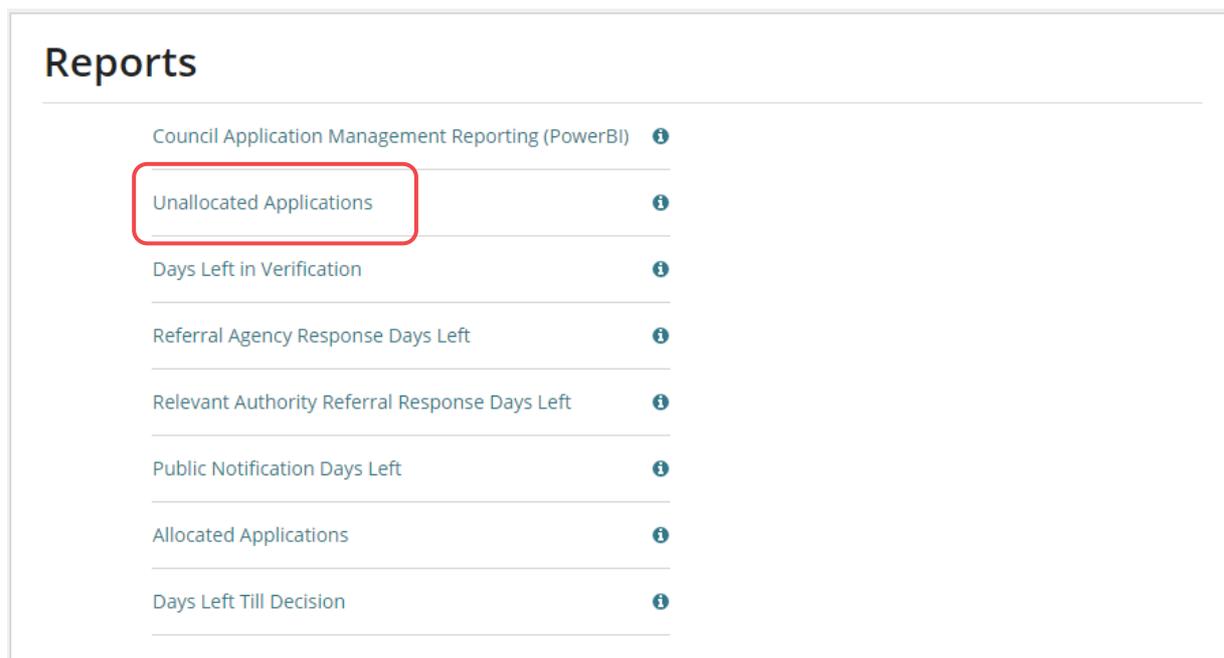
### View the Development Application Reports

1. Click on **Reporting**.



The **Reports** page shows the list of development application reports, including the link to access the 'Council Application Management Reporting (Power BI)'.

2. To open a report, click on the report name. In this example, the 'Unallocated Applications' report has been run.



## Sort application information

The report column headings can be used to change how the report information is sorted; i.e. numerically (in ascending or descending order) or alphabetically (A-Z or Z-A).

The default sorting option is by application **ID** in descending order (i.e. highest to lowest).

3. Click on the column heading to order numerically or alphabetically. For this example the report will be sorted by 'Consent Status' in ascending order (i.e. A-Z).

**Unallocated Applications**  
This report displays the list of applications without an allocated assessor. It displays information related to active consents and development approvals.

▼ Show Filters

ID	Owner	Location	Nature of Development	Relevant Authority	Submitted	Lodged	Application Status	Consent Type	Consent Status ↑	Development Approval Status
20001067	S Woods	17 O'HALLORAN PDE EDITHBURGH SA 5583	land division one into two	State Planning Commission	15 Jul 2020	15 Jul 2020	Lodged	Planning Consent	Awaiting Further Information	—
20001442	A Marry	742 NILPINNA RD NILPINNA STATION SA 5723, 742 NILPINNA RD NILPINNA STATION SA 5723	Need to construct a room attaching to the existing building.	State Planning Commission	29 Jul 2020	29 Jul 2020	Lodged	Planning and Land Division Consent	Awaiting Further Information	—
20001854	S Woods	2566 STUART CREEK RD STUARTS CREEK SA 5720	chicken farm	State Planning Commission	22 Sep 2020	22 Sep 2020	Lodged	Planning Consent	Awaiting Further Information	—
20001261	Homes R Us	LOT 17 OODNADATTA TRK MARREE SA 5733	Construction of a house that is one level	State Planning Commission	23 Jul 2020	—	Submitted	Planning Consent	Awaiting Mandatory Documentation	—

4. Click on the **Consent Status** column heading again to change the order to descending (i.e. Z-A).

**Unallocated Applications**  
This report displays the list of applications without an allocated assessor. It displays information related to active consents and development approvals.

▼ Show Filters

ID	Owner	Location	Nature of Development	Relevant Authority	Submitted	Lodged	Application Status	Consent Type	Consent Status ↓	Development Approval Status
715	p testing	242 STURT RD MARION SA 5043	Performance Test UAT Env Planning and Building Consent	State Planning Commission	10 Mar 2020	22 May 2020	Lodged	Planning Consent	Under Assessment	—
20000381	S Woods	LOT 127 HIGH ST MARREE SA 5733	15 site caravan park	State Planning Commission	5 Jul 2020	5 Jul 2020	Lodged	Planning Consent	Under Assessment	—
20000486	H Public	LOT 10 MARREE AERODROME RD MARREE SA 5733, LOT 10 MARREE AERODROME RD MARREE SA 5733	tourist accommodation and shop, solar powered and underground water tank system	State Planning Commission	11 Jul 2020	11 Jul 2020	Lodged	Building Consent	Under Assessment	—

### Information!

These records are not sorted in the order shown on screen when the **Export Report** function is performed. Use the sorting and filter tools found in Microsoft Excel.

## Filter application records

The data filters are utilised to further filter the returned application records to show, for example, by location specific application(s), date lodged, date submitted or consent type.

1. Click on **Show Filters** to display the data filter options.

Unallocated Applications						
This report displays the list of applications without an allocated assessor. It displays information related to active consents and development approvals.						
<a href="#">Show Filters</a>						
ID	Owner	Location	Nature of Development	Relevant Authority	Submitted ↓	Lodged
20002173	T Fountain	LOT 109 FIFTH ST MARREE SA 5733, LOT 109 FIFTH ST MARREE SA 5733	Two-storey detached dwelling including swimming pool and deck	State Planning Commission	4 Dec 2020	4 Dec 2020

2. Complete a single filter and/or combination of filters (referring to the table below) to show applications matching the filter information specified.
3. Click on **Search** to perform the filtering.

Note: use the **Clear** option to remove filters before performing another filter search.

Unallocated Applications										
This report displays the list of applications without an allocated assessor. It displays information related to active consents and development approvals.										
<a href="#">Hide Filters</a>										
<b>Location</b> <input type="text" value="Type atleast 3 characters to search"/>		<b>Lodged</b> From <input type="text" value="06/10/2020"/> To <input type="text" value="dd/mm/yyyy"/>		<b>Submitted</b> From <input type="text" value="dd/mm/yyyy"/> To <input type="text" value="dd/mm/yyyy"/>		<b>Consent Type</b> <input type="text" value="Planning Consent"/>		<input type="button" value="CLEAR"/>		<input type="button" value="SEARCH"/>
ID	Owner	Location	Nature of Development	Relevant Authority	Submitted ↓	Lodged	Application Status	Consent Type	Consent Status	Development Approval Status
20002173	T Fountain	LOT 109 FIFTH ST MARREE SA 5733, LOT 109 FIFTH ST MARREE SA 5733	Two-storey detached dwelling including swimming pool and deck	State Planning Commission	4 Dec 2020	4 Dec 2020	Lodged	Building Consent	Awaiting Verification	—

Filter	Description
<b>Location</b>	Show applications for a specific location (i.e. suburb, town name, street name, etc.).
<b>Lodged (From and To)</b>	Show applications lodged (i.e. verification completed and the lodgement fees paid) for a date range or from a specific date.
<b>Submitted (From and To)</b>	Show applications submitted for a date range or from a specific date.
<b>Consent Type</b>	Use to show applications for a specific consent, i.e. planning, planning and land division, land division or building.

## View application details from the report

The application ID is a hyperlink to the Development Application details. In this unallocated report example, by viewing the Development Application from the Summary page the allocation of the assessor can be performed; thereby removing the application consent from the unallocated report.

1. Click on ID to open the Development Application to view more details and/or perform a specific action.

ID	Owner	Location	Nature of Development	Relevant Authority	Submitted	Lodged	Application Status
20001067	S Woods	17 O'HALLORAN PDE EDITHBURGH SA 5583	land division one into two	State Planning Commission	15 Jul 2020	15 Jul 2020	Lodged

The **Development Application – Summary** page shows, within which the required actions can be performed. For e.g., you can allocate an assessor to the applicable consent, complete an assessment, start verification, etc.

### Development application: 20001067

Summary Documents Event History Sharing access Related Actions



There is currently no action required from you.

**Development location(s)**  
17 O'HALLORAN PDE EDITHBURGH SA 5583

**Title ref** CT 6076/965 **Plan parcel** D86743 AL101 **Council** Yorke Peninsula Council

**Nature of development** [edit](#)  
land division one into two

**Elements selected** [edit](#)

- Land division
  - Land Division within the Limited Land Division Overlay

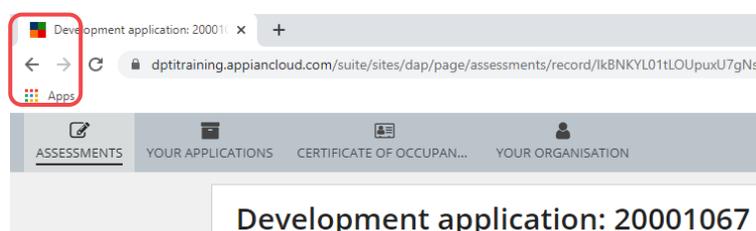
[Submission details](#)

[Zoning information](#)

[Applicant's view](#) [Help for this section](#)

Consent / Stage / Dev. Approval	Relevant Authority	Allocated Assessor	Status	Days
▶ Planning Consent	Assessment panel/Assessment manager at State Planning Commission	<input type="text" value="Type to select the user"/>	Awaiting Further Information	

Click on **← Back Arrow** in the browser window to go back to the report.



## View allocated applications from the report

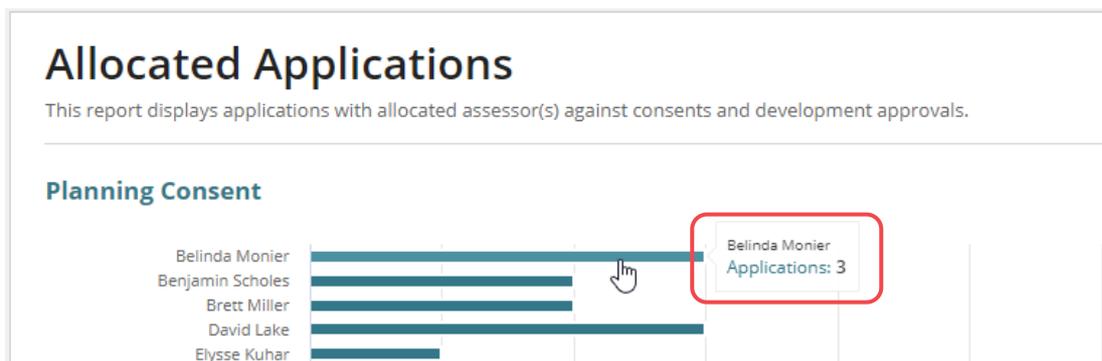
### Instructions for Report: Allocated Applications

The Allocated Applications report is a bar graph that visually represents staff application allocations for each consent, i.e. planning, planning and land division, land division and building.

#### Information!

Each staff member is allocated a consent during the set-up of their user account. To maintain staff members' consent allocation to only show their name under the consent(s) they will perform during the development approval process, refer to the [Manage Online Account](#) guide for instructions on changing a user's consent allocation.

1. Move the cursor over the bar to view the number of applications allocated.
2. Click on the bar to view a list of the staff members' allocated applications.



3. Complete the [Sort application information](#) instructions as required.
4. Complete the [View application details from the report](#) instructions as required.

**Allocated Applications**  
This report displays applications with allocated assessor(s) against consents and development approvals.

[< Back to all users](#)

**Applications Allocated to Belinda Monier**

ID	Owner	Location	Nature of Development	Relevant Authority	Who	Lodged	Application Status	Consent Type	Consent Status	Development Approval Status	Days ↑
20000358	J Bloggs	664 HOLOWILIENA SOUTH RD HOLOWILIENA SOUTH SA 5432	Low intensity sheep farming	State Planning Commission	👤	—	Submitted	Planning Consent	Awaiting Payment	—	🕒 -
20001996	B Monier	LOT 1 LUNATIC LANE ANDAMOOKA SA 5722	Build a helipad to land my helicopter	State Planning Commission	👤	16 Oct 2020	Lodged	Planning Consent	Under Assessment	—	🕒 31
20001997	B Monier	LOT 1 LUNATIC LANE ANDAMOOKA SA 5722	Put vines on my land and make my own wine	State Planning Commission	👤	16 Oct 2020	Lodged	Planning Consent	Under Assessment	—	🕒 31

**EXPORT REPORT**

5. Complete the [Export report results to view in Microsoft Excel](#) instructions (as required).
6. Click on **< Back to all users** to show the allocated applications.

## Export report results to view in Microsoft Excel

To analyse the report data in Microsoft Excel use the **Export Report** function to further sort and filter the returned data.

### 7. Click on **Export Report**.

### Unallocated Applications

This report displays the list of applications without an allocated assessor. It displays information related to active consents and development approvals.

^ Hide Filters

**Location**

CLEAR

**Lodged**

From: 06/10/2020

To: dd/mm/yyyy

**Submitted**

From: dd/mm/yyyy

To: dd/mm/yyyy

**Consent Type**

Planning Consent

**SEARCH**

ID	Owner	Location	Nature of Development	Relevant Authority	Submitted ↓	Lodged	Application Status	Consent Type	Consent Status	Development Approval Status
20002039	J Smith	LOT 502 LUNATIC LANE ANDAMOOKA SA 5722	Detached dwelling with associated carport and swimming pool	State Planning Commission	23 Oct 2020	23 Oct 2020	Lodged	Planning Consent	Under Assessment	—
20002014	J Smith	LOT 502 LUNATIC LANE ANDAMOOKA SA 5722	Detached dwelling with associated carport and outbuilding	State Planning Commission	22 Oct 2020	22 Oct 2020	Lodged	Planning Consent	Under Assessment	—
20002010	J Smith	LOT 1 ANDAMOOKA RD ANDAMOOKA SA 5722	Detached dwelling, freestanding carport and swimming pool	State Planning Commission	21 Oct 2020	21 Oct 2020	Lodged	Planning Consent	Under Assessment	—
20001974	J smith	LOT 1500 ANDAMOOKA RD ANDAMOOKA STATION SA 5722	Detached Dwelling	State Planning Commission	13 Oct 2020	13 Oct 2020	Lodged	Planning Consent	Under Assessment	—

GO BACK

**EXPORT REPORT**

### 8. Click on the **report download** to open in the applicable application, i.e. Microsoft Excel.

Unallocated Appli....xlsx ^

For more information visit  
[plan.sa.gov.au](http://plan.sa.gov.au)



**Government of South Australia**  
Attorney-General's Department