Add a Bookmark

The Data Exchange reports allow you to add Bookmarks to save your filters and selections for later use. Bookmarks can be created for reports you access on a regular basis. This task card describes the process of adding a Bookmark.

Bookmarks are saved against individual reports. For example, if a bookmark is created in the Organisation Overview report it can only be accessed in that report.

| **Step** | **Action** |
| --- | --- |
|  | **Creating a bookmark**  Open a report and select the desired sheet. Make your selections by adding the filters you require.  Refer to the *Applying Filters* task card for further information on how to apply a filter.  screenshot of an organisation summary reporr, with the filters highlighted. |
|  | Select the bookmark icon located in the top right hand corner.  A screenshot from the report menu where the bookmark is highlighted. |
|  | Click ‘**Create new bookmark**’.  Screenshot of create a bookmark option within the bookmarks tab. |
|  | Enter a Title and Description of the bookmark.  To save the bookmark click the green tick icon.  Screnshot of the bookmark pop up with the 'Title', 'Description'. amd 'tickbox' highlighted. |
|  | **Accessing a bookmark**  Navigate to the report where the bookmark was saved. Click on the **Bookmarks** icon underneath the report information.  Screenshot of the 'Training - Organisation Overview' report, with the bookmarks tab highlighted. |
|  | Your bookmarks will display under the **My Bookmarks** heading. Click on the bookmark you require.  Screenshot of 'My Bookmarks', with the 'Organisation Summary - 2017-18' highlighted. |

You can find more information on reporting requirements in the [Data Exchange Protocols](https://dex.dss.gov.au/document/81). For further information on reports functionality, please visit the [Training](https://dex.dss.gov.au/training) tab of the Data Exchange website.

For system support, contact the Data Exchange Helpdesk by email at [dssdataexchange.helpdesk@dss.gov.au](mailto:dssdataexchange.helpdesk@dss.gov.au) or on 1800 020 283.