# Navigation guide

This task card explains the following:

* [Data Exchange home page](#_Data_Exchange_home)
* [Navigation within the different screens](#_Navigation_within_the)
* [Buttons and icons](#_Buttons_and_icons)

### Data Exchange home page

The home page of the Data Exchange web-based portal has a number of separate action tiles. Refer Figure 1.

1. Go to – search for clients, cases and sessions
2. Find action tile – clients and cases
3. View action tile – SCORE assessments
4. Add action tiles – clients, cases, sessions and SCORE assessments
5. My Organisation – access for Data Exchange Organisation administrators only
6. Access MyDEX reports – access self-service report functionality for data entered by your organisation

To access any of these areas, select either the action tile or hyperlink. To search in the **Go to** field, simply start typing.

Figure 1- Data Exchange home page



### Navigation within the different screens

When you open a record (case, client, session or SCORE) the "I want to..." box will display on most pages on the right hand side. Refer Figure 2.

Links in this box are shortcuts to view or update records. There are also administrative functions that are only available to those with Data Exchange Organisation administrator access.

Figure 2 – “I want to…” box



### Buttons and icons

There are a number of buttons and icons used throughout the web-based portal. Table 1 provides a listing of the common button and icons. Please note this listing is not exhaustive.

Table 1 - Data Exchange web-based portal buttons and icons

| **IMAGE** | **DESCRIPTION** |
| --- | --- |
| This is a screen shot of the add button | Displays at the Tags field in the Add a client – Client details page. Select to add tags to the client record. |
| This is a screen shot of the Add session button | Displays at the completed Case details screen. Select to add sessions to the case. |
| Attach selected clients button | Displays when you have completed data entry on a session or case.When you select the clients you wish to add, select the Attach button to add them to the session or case. |
| Back button of the Web based portal.  | Displays when you have entered data and moved to a new data entry screen.Select the Back button when you need to go back and correct data entered before the record is submitted. |
| Date picker icon | The calendar function can be used when entering dates in any field, or you can type them.* Select the calendar function icon.
* Use the arrows to move back and forward through the months.
* Select the relevant date – the field will be populated with that date.
 |
| This is a screen shot of the case icon. | The Case icon displays to identify a case has been created. |
| This is a screen shot of the add a case icon | Select the Add a case icon at the home page to create a new case record. |
| This is a screen shot of the client icon | The Client icon displays to identify a client has been created. |
| This is a screen shot of the Add a client icon | Select the Add a client icon at the home page to create a new client record. |
| This is a screen shot of the Copy session button | Displays at the completed Case details screen. Select to copy an existing session(s) to the case. |
| Delete Case button | Displays when you view a client, case or session record.* If you create a record in error use the Delete button to remove the record.
* You must remove SCORE assessments before deleting sessions, and sessions before deleting cases. Any data for a previous reporting period cannot be deleted.
 |
| Delete icon | The Delete icon displays on a client record when you select to edit a referral or SCORE for a session. |
| Drop down box | The drop down box allows you to select information that has been pre‑loaded.* Select the down arrow to display the list.
* If the list is long you can scroll down to find the information, or type the first few letters of the word and select Enter.
 |
| Edit Attendees button | Displays when you open a case, client or session record.1. Select the Edit button to make changes to a record.
2. You may edit a record at any time within a reporting period.
 |
| Edit Icon | Select on the edit icon to make changes to that record. |
| Expand record icon | The Expand icon displays on all types of record lists (e.g.: client, case, outlet) to view more details on that record.Select the expand icon to view a summary of data entered for a record. |
| This is a screen shot of the Error message icon | The Error message icon displays when required information is missing from a page. |
| hyperlinks | Hyperlinks are used in many places on the Data Exchange web-based portal. Hyperlinked text is blue and underlined. When selected, hyperlinks will open extra fields, a record or perform a task. |
| This is a screen shot of the Information icon | The Information icon will display to advise information or tip for the client, case or session page. |
| More options button | Displays when you are viewing a record.Select More to open up the record to display more detailed information. |
| Next Button | Displays when you have completed a data entry step.Select Next to go to the next step in a process. |
| This is a screen shot of the pagination function which displays the page bar at the bottom of a list of entries. | If a record list (clients, cases, sessions, activities, users etc.) goes over more than one page you can move through the pages by using the paging/pagination function.* The total number of records is shown next to Results at the top of the list.
* Select Next to go to the next page or select a page number to go to that page.
 |
| This is a screen shot of the Progress bar which shows the steps in any process you complete in the web-based portal. | The Progress Bar displays at the top of data entry screens. It shows the steps completed in the data entry process, and how many steps are needed to complete an action. |
| This is a screen shot of the Referral source and reasons icon | The Referral source and reasons ‘outline’ icon displays a client's record summary attached to a case. You can use this icon to add, delete or edit referrals to other services for a client. |
| This is a screen shot of the Referral source and reasons icon - Full | The Referral source and reasons ‘coloured’ icon displays when the full quota of referrals has been added to a client's record summary attached to a case. |
| This is a screen shot of the referral source and reasons icon | The Referral to other services ‘outline’ icon displays on a client's record summary attached to a session. You can use this icon to add, delete or edit referrals to other services for a client. |
| This is a screen shot fo the Referral to other services advising that some referrals has been added. | The Referral to other services ‘coloured’ icon displays when a referral has been added to a client's record summary attached to a session. One internal and one external referral type can be added per client per session. |
| This is a screen shot of the referral to other services icon showing that the full quota of referrals has been added for this client at this session | The Referral to other services ‘tick’ icon displays when the full quota of referrals has been added to a client's record summary attached to a session. |
| Remove selected clients button | Displays when clients have been added to a case or session.Select Remove selected clients to detach clients that have been added to session or a case. |
| Save button of the Web Based portal, screenshot of the Save button.  | Select Save to keep changes that you have made to records. |
| This is a screen shot of the Add a score icon | The SCORE ‘outline’ icon displays on a client record summary attached to a session. You can use this icon to add, delete or edit SCORE assessment types (Goal, Circumstance or Satisfaction) for a client resulting from a session. |
| This is a screen shot of the One SCORE has been added icon | This SCORE ‘coloured’ icon displays when one SCORE assessment has been added to a client record at a session and another SCORE assessment can be added. |
| This is a screen shot of the score assessment icon indicating that no more assessments can be added for this client at this session | This SCORE ‘tick’ icon displays when the full quota of SCORE assessments have been added to a client record at a session. |
| This is a screen shot of the SCORE is present icon | This SCORE icon displays on a client record advising a SCORE assessment has been added to the client. Displays in the Find a client screen. |
| This is a screen shot of the search icon | Select the Search button after entering the search criteria.  |
| This is a screen shot of the search icon | The Search icon is found in the ‘Go to’ field and is used to search for client, case and session records. |
| This is a screen shot of the session icon | The Session icon displays to identify a session has been created. |
| This is a screen shot of the add a session icon | Select the Add a session icon found at the home page to create a new session record. |
| This is a screen shot of the Successfully added icon  | The Successfully added icon will display to highlight the creation of a case, client or session has been successful. |
| Show Box for more listings | Show Pages allows you to choose how many records you wish to display on any page.* Go to the show box at the top right of any list.
* Select via the drop down box the number of records to show on a page.
* Select GO to change the view.
 |
| Sort list icon | View a list of records in descending or ascending order by selecting the Sort icon.Records are defaulted to show the most recently created record at the top. |
| Submit button | Displays once you have completed data entry steps required to complete a case, session or client record.Select Submit once you have reviewed and checked data you have entered. |
| Tick box | A tick box is used to select a record to attach it to a case, session, outlet or user.* Check the box to select the record.
* Select the Attach button to complete the attachment.
 |
| This is a screen shot of the warning button | The Warning icon will display to highlight a possible issue with the record. |

You can find more information on outlets, clients, cases, and sessions on the [Data Exchange Protocols](https://dex.dss.gov.au/document/81) and the [Training](https://dex.dss.gov.au/training) page.

For system support, contact the Data Exchange Helpdesk by email dssdataexchange.helpdesk@dss.gov.au or on 1800 020 283.