



Find and edit a session

Task card

This task card discusses the following:

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 - [Method 2 – From the Find Case button](#)
- [Results section](#)
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KEY HIGHLIGHTS

- At least one session must be recorded during a reporting period for the session and associated clients to be counted in reports.
- A session can be updated any time only during the relevant reporting period.
- The use of special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

Information on updating sessions

A session records what service was delivered on a particular date within a reporting period, the type of service delivered and which clients attended. Sessions are a critical part of the service record of a service provider and drive the reporting function of the Data Exchange.

At least **one session** must be recorded as occurring within a reporting period for the session and associated clients to be counted in reports.

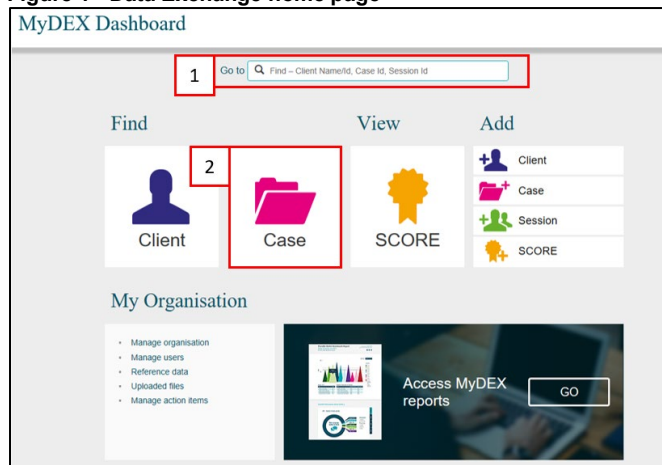
Find a session

There are a number of ways to find an existing session. Refer to Figure 1.

Go to the Data Exchange home page and either:

1. Enter information in the **Go to** field
2. Select the **Find Case** action tile

Figure 1 - Data Exchange home page

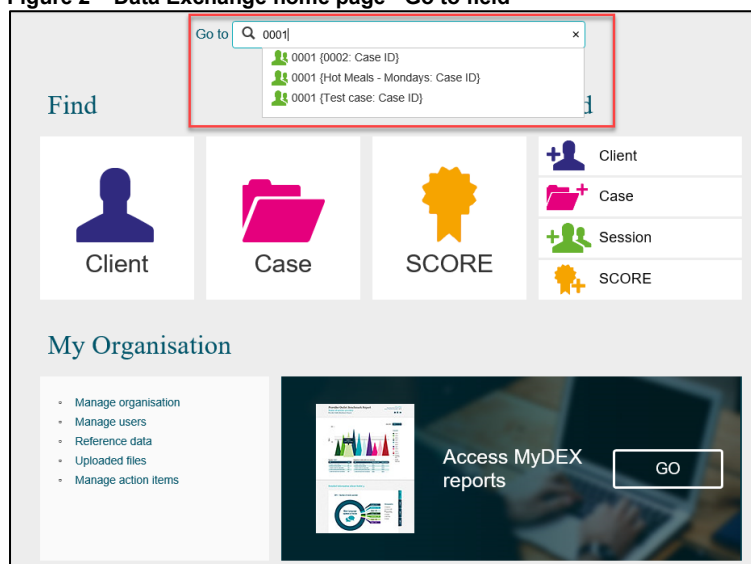


Method 1 – From the Go to field

Start typing the session ID (this could be numerical or alphabetical) in the **Go to** field

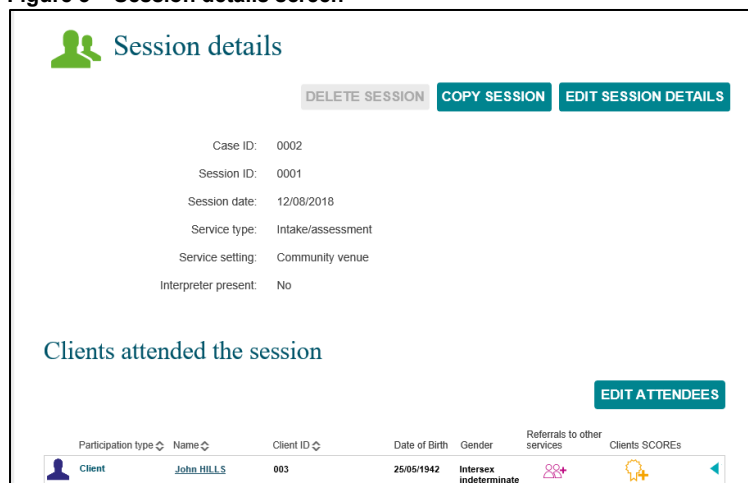
The field will provide a drop-down list to select the required session. Refer to Figure 2.

Figure 2 – Data Exchange home page - Go to field



The **Session details** screen will display. Refer to Figure 3.

Figure 3 – Session details screen



Refer to the [Edit a session](#) details in this task card for further instructions.

Method 2 – from the Find a Case button

The **Find a case** screen will display. Refer to Figure 4.
Find your session by selecting the corresponding case

Figure 4 – Find a case screen

 Find a case

Case ID:

Client ID:

Outlet:

Program activity:

[Show Advanced Options](#)

[Clear Outlet and Activity](#)

SEARCH

Clear

Results (4)

Show10GO

Case ID	Outlet	Program activity	Ended on	Sessions	Created
Individual Case	DEXPO Outlet 1	Economic Pathways to Refugee Integration	1	25/05/2026	
Community event	DEXPO Outlet 1	Settlement Engagement and Transition Support	1	25/05/2026	
Case 123	DEXPO Outlet 1	Training Activity	2	29/04/2026	
Training Case 1	DEXPO Outlet 1	Training Activity	1	30/03/2026	

Results section

- The most recently created cases will display in the **Results** section. Refer to Figure 5.
1. Select **GO** to change the amount of records displayed on the screen. The options are 10, 20 and 50.
 2. Click on the heading hyperlinks of Case ID, Outlet, etc. to filter columns from ascending to descending order and visa-versa either alphabetically or numerically.
 3. Click on the case hyperlink to select the case.

Figure 5 – Results section

Show10GO1

Case ID	Outlet	Program activity	Ended on	Sessions	Created
Individual Case	DEXPO Outlet 1	Economic Pathways to Refugee Integration	1	25/05/2026	
Community event 3	DEXPO Outlet 1	Settlement Engagement and Transition Support	1	25/05/2026	
Case 123	DEXPO Outlet 1	Training Activity	2	29/04/2026	
Training Case 1	DEXPO Outlet 1	Training Activity	1	30/03/2026	

Select the relevant case hyperlink and the **Case details** screen will display. Refer to Figure 6.

Figure 6 – Case details screen

Case details

DELETE CASE EDIT CASE DETAILS

Case ID: Community event
Outlet: DEXPO Outlet 1
Program activity: Settlement Engagement and Transition Support
Total number of unidentified clients associated with case: 25
Attendance profile: Community event
End date:

Clients attached to the case (4)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Referral source and reasons
Name hidden	Client 123	12/06/1988	Woman or female	
Gary OLDFIELD	002	21/05/1978	Man or male	
Ionatana LAUTI	003	03/06/1989	Man or male	
Katerina KARAGIANNIS	004	22/11/1999	Woman or female	

Sessions associated with the case (1)

ADD SESSION

Session ID	Session date	Service type	Created	Total client attendance
0002	01/03/2026	Community Engagement	25/05/2026	28

COPY SESSION

Select the relevant session hyperlink and session details will display. Refer to Figure 7.

Figure 7 – Session screen

Sessions associated with the case (1)

ADD SESSION

Session ID	Session date	Service type	Created	Total client attendance
0002	01/03/2026	Community Engagement	25/05/2026	28

COPY SESSION

< BACK

Refer to the [Edit a session](#) details in this task card for further instructions.

Edit a session

There are a number of ways to edit an existing session. Refer Figure 8.

1. Delete a session

NOTE: you can only delete a session that is in the current reporting period.

2. Copy a session
3. Edit a session

NOTE: The use of Special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

4. Edit Attendees

Figure 8 – Session details screen

The screenshot shows the 'Session details' screen. At the top left is a green icon of two people. The title 'Session details' is in blue. Below the title are three buttons: 'DELETE SESSION' (callout 1), 'COPY SESSION' (callout 2), and 'EDIT SESSION DETAILS' (callout 3). The session details are listed as follows:

- Case ID: Community event
- Session ID: 0002
- Session date: 1/03/2026
- Service type: Community Engagement
- Number of unidentified clients attended session: 25
- Service setting: Community venue
- Interpreter present: No

Below the session details is the section 'Clients attended the session'. To the right of this section is a button 'EDIT ATTENDEES' (callout 4). Below this is a table with the following data:

Participation type	Name	Client ID	Date of Birth	Gender	Referrals to other services	Clients SCOREs
Client	Ionatana LAUTI	003	03/06/1989	Man or male	2	100
Client	Gary OLDFIELD	002	21/05/1978	Man or male	2	100
Client	Katerina KARAGIANNIS	004	22/11/1999	Woman or female	2	100

You can find more information on outlets, clients, cases, and sessions on the [Data Exchange Protocols](#) and the [Training](#) page.

For system support, email the [Data Exchange Helpdesk](#) or use our [online contact form](#).