Update User Profiles

If you are a *User Administrator* for your organisation, you will be able to make changes to user profiles in the Data Portal for users within your organisation. The main application of this will be to add roles and folders to profiles for newly registered users to ensure they can use the Data Portal to work with data assets as required. Another use of this function, however, may be to revoke a user's profile if they have left the organisation or no longer need to access the Data Portal.

If you are the *User Administrator* for a Parent organisation, you will also be able to update user profiles for users within any of the Child organisations that sit underneath the Parent.

To update a user profile in the Data Portal:

1. Open the Data Portal through Health Data Portal.
2. Log in using the information provided in the *Initial Access to the Health Data Portal* QRG.

The Data Portal home screen will display.

3. From the Data Portal home screen, select **Manage** and then select **Users** from the list that displays.

The Manage Users screen will display, showing a list of all users with *active* and *pending* user profiles within your organisation.

4. If needed, to search for the user whose profile you wish to update, enter the user's name in the **Only show Users containing** field.

If your organisation is part of a Parent/Child organisational structure, you will see the **Only**

show Users in Organisation field as well (as shown above).

5. If this is the case and the user whose record you are looking for resides in another organisation within your structure, select ⏷ in the **Only show Users in Organisation** field and select the user's organisation from the list.

Alternatively, you can select ⇳ in the header of the required column (for example **Last Name**) to find the required user's record.

6. Once you have entered the required search criteria, select **Search**.

A list of matching users will display.

7. To display the details for the selected user, select the first name link for the user.

The User Details screen will display.

8. To open the user's profile for editing, select ✏ at the top of the screen.

The User Details screen will update so the user's profile can be edited.

9. If the user has entered their email address incorrectly as part of their registration for the Data Portal, you can update the user's address in the **Email** field.

10. In the **Roles** section, select or deselect the relevant check box to add or remove a role to/from the user's profile.

You can't assign the *Data Receiver* role to a user within your organisation. This role can only be assigned to external users responsible for processing your data.

11. In the **File Permissions** section, select **Edit**.

12. In the File Permissions dialog box, select the file permissions to be added to the user's profile from the **Available** section and select ▸.
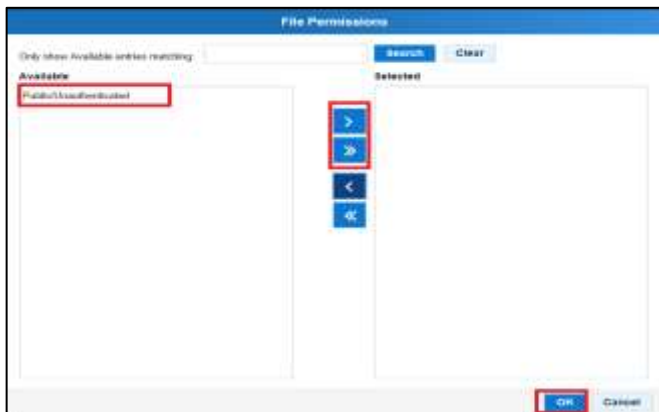
File permissions determine the published data assets a user will be able to see in the Data Portal.

13. To continue, select OK .

14. In the **Folders** section, select Edit .

15. In the **Available** section of the Folders dialog box, select the check boxes for the folders to be added to the user's profile and select > .
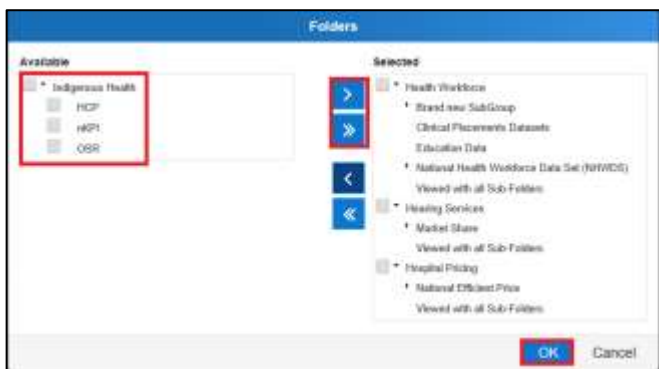
Where relevant, it is important to select both the top-level folder and at least one sub-level folder underneath for the user to be able to perform the required functions.

Folders determine the data assets the user will be able to view and/or edit as the data assets go through the submission workflow process.

16. To continue, select OK .

17. If you need to revoke the user's profile, select ⌄ in the **User Status** cell and select **Revoked**.

18. Select ⌄ in the **Reason** cell and select the applicable reason for the user's profile being revoked.

19. To save the changes to the user's profile, select Save .

20. In the Save Changes dialog box, select Yes .

The changes made will be applied to the user's profile.

Update Your Own User Profile

As a *User Administrator*, you can update your own user profile in addition to being able to update profiles for other users in your organisation. For example, you may need to add a role to your profile (*Submission Uploader*, *Submission Reviewer* etc) so you can be involved in the data asset submission workflow.

To update your user profile in the Data Portal:

1. Ensure the Data Portal home screen is displayed.

2. Select [icon] next to your name in the top right-hand corner of the screen and select **Manage My User Profile** from the list that displays.

The User Details screen will display.

3. To open your profile for editing, select ✎ at the top of the screen.

The User Details screen will update so your profile can be updated.

4. If needed, you can update your email address in the **Email** field.

5. In the **Roles** section, select or deselect the relevant check box to add or remove a role to/from your user profile.

6. In the **File Permissions** section, select Edit .

7. In the File Permissions dialog box, select the file permissions to be added to your profile from the **Available** section and select > .

8. To continue, select OK .
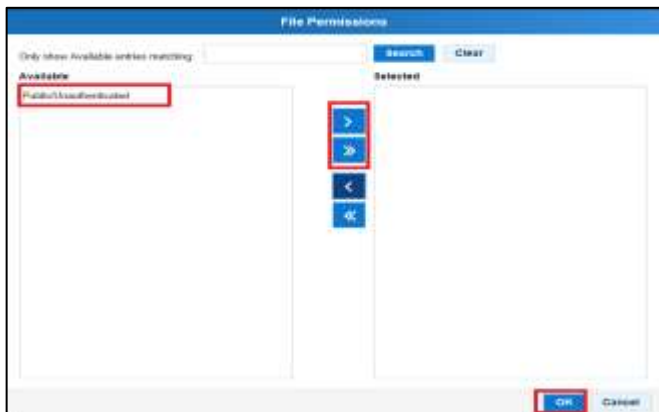
9. In the **Folders** section, select Edit .

10. In the Folders dialog box, select the check boxes for the folders to be added to your user profile and select > .

11. To continue, select OK .

12. To save the changes, select Save .

13. In the Save Changes dialog box, select Yes .

The changes will be applied to your user profile.

Process Alternate User Profile Requests

When a user requests an alternate user profile in the Data Portal, the *User Administrator* for the applicable organisation will receive an email informing them a request has been submitted. The administrator can then action the request as required.

To process an alternate user profile request in the Data Portal:

1. Ensure the Data Portal home screen is displayed.

2. From the Data Portal home screen, select ▾ Manage and then select **Users** from the list that displays.

The Manage Users screen will display.

3. Enter the user's name in the **Only show Users containing** field.

4. To continue, select Search .

A list of the selected user's profiles will now display in the User List section, including the new profile that has been requested. This profile will have the status of *Pending*.

5. For the user profile you are actioning, select the link in the **First Name** column.

The User Details screen will display.

6. To update the user's profile, select ✏ at the top of the screen.

The User Details screen will update so the user's profile can be edited.

7. In the **Roles** section, select the applicable check box(es) for the role(s) to be added to the new user profile.

8. In the **File Permissions** section, select Edit .

9. In the File Permissions dialog box, select the file permissions to be added to the user's role from the **Available** section and select > .

10. To continue, select OK .

11. In the **Folders** section, select Edit .

12. In the **Available** section of the Folders dialog box, select the check boxes for the folders to be added to the user's profile and select > .

13. To continue, select OK .

14. In the **User Status** section, select ▾ in the **User Status** field and select the appropriate action from the drop-down list that displays.

    a. To *accept* the user profile request, select **Active**.

    b. To *reject* the user profile request, select **Revoked**.

⚠ If you select *Revoked*, the **Reason** field will display asking you to confirm why the profile has been revoked. Select the applicable reason from the list.

15. To save the changes to the profile, select Save .

16. In the Save Changes dialog box, select Yes .

The List of Users screen will display with a note informing you the changes you have made to the user's profile may not be visible in the Data Portal for up to five minutes.

Once the changes have updated, the user's alternate profile status will change to either **Active** or **Revoked**, depending on the action taken.