# Manage User Records (User Administrator) Screencast – Accessible Version

Introduction

Welcome to the *Manage User Records (User Administrator)* screencast.

This screencast will show you how to manage user records for users within your organisation, in the Data Portal as a *User Administrator*.

By the end of this screencast you should know how to:

* Update another user’s profile,
* Update your own user profile, and
* Process an alternate user profile request.

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. For example, you will be able to add roles and folders to newly registered users so they can use the Data Portal.

1. To continue, select the **Manage** button and select the **Users** option.

**Note:** By default, all users with *Active* and/or *Pending* profiles will display in the list of users for your organisation. To also display *Revoked* user profiles, select the *Show revoked users* check box.

1. In the **Only show Users containing** field, enter the name of the user whose profile you wish to update.
2. If you are the *User Administrator* for other organisations as part of a Parent/Child structure, you can select the **down arrow** in the **Only show Users in Organisation** field and select the organisation the user belongs to.

**Note:** Only *User Administrators* for organisations in a Parent/Child structure will see the **Only show Users in Organisation** field.

1. Select the **Search** button to display a list of users meeting your search criteria.
2. To continue, select the **First Name** link for the applicable user.
3. To open the user’s profile for editing, select the **Edit User Details (the Pencil)** button at the top of the screen.

The User Details screen updates so fields can be edited.

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

File permissions determine the data files the user will be able to see in the Data Portal once they are published.

**Note:** You will only be able to add file permissions that have been assigned to your own profile. File permissions are only needed for users to be able to see information published for you by the Department of Health and Aged Care so you probably only need to assign a file permission if you have been instructed to.

1. In the **File Permission** section, select the **Edit** button.
2. In the **File Permission** dialog box, select the file permissions to be added to the user’s profile from the **Available** section.
3. Select the right arrow button to move the selected file permission across to the **Selected** section.
4. To continue, select the **OK** button.

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

1. In the **Folders** section, select the **Edit** button.
2. In the **Available** section of the Folders dialog box, select the check boxes for the folders to be added to the user’s profile. It is important to select both the top-level folder and at least one sub-level folder (and one sub-sub level folder if required) underneath for the user to be able to perform the required functions.
3. Select the right arrow button to move the chosen folder(s) across to the **Selected** section.
4. To continue, select the **OK** button.
5. To save the changes to the use’s profile, select the **Save** button.
6. In the Save Changes dialog box, select the **Yes** button.

The changes to the user’s details will be applied to their user profile. Please note the changes may take up to 5 minutes to update.

Update Your Own Profile

As a *User Administrator*, you can update certain elements your own profile in addition to updating profiles for other users in your organisation.

1. To update your user profile in the Data Portal, navigate to the Data Portal home screen, then select the **down arrow** next to your name in the top right-hand corner of the screen.
2. Select **Manage My User Profile** from the list that displays.
3. To edit your details, select the **Edit User Details** button (the Pencil)at the top of the screen.
4. In the **Role(s)** section, select or deselect the relevant check box to add or remove a role to/from your user profile.
5. In the **Folders** section, select the **Edit** button.
6. In the **Available** section of the Folders dialog box, select the check boxes for the folders to be added to your user profile.
7. Select the right arrow button to move the chosen folder(s) across to the **Selected** section.
8. To continue, select the **OK** button.
9. To save the changes to your profile, select the **Save** button.

The changes will be applied to your user profile. Please note the changes may take a few minutes to update.

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 *User Administrator* can then action the request as required.

1. To process an alternate user profile request in the Data Portal, select the **Manage** button and then select **Users**.

A list of profiles for all registered users in your organisation will display in the **User List** section of the Manage Users screen, including the *Pending* user profile that has been requested by a user outside of your organisation.

1. If you don’t see the user you are after, you can enter the user’s name in the **Only show users containing field** and then select **Search** to locate the user profile.
2. To continue, select the **First Name** link for the **Pending** profile.
3. To update the user’s profile, select the **Edit User Details (the Pencil)** button at the top of the screen.

The User Details screen will update to allow you to edit the fields.

1. In the **Roles** section, select the applicable check box(es) for the role(s) to be added to the new user profile.
2. In the **File Permission** section, select the **Edit** button.

**Note:** You will only be able to add file permissions that have been assigned to your own profile. File permissions are only needed for users to be able to see information published for you by the Department of Health and Aged Care so you probably only need to assign a file permission if you have been instructed to.

1. In the **File Permission** dialog box, select the file permissions to be added to the user’s profile from the **Available** section.
2. Select the right arrow button to move the selected file permission across to the **Selected** section.
3. To continue, select the **OK** button.
4. In the **Folders** section, select the **Edit** button.
5. In the **Available** section of the Folders dialog box, select the check boxes for the folders to be added to the user’s profile.
6. Select the right arrow button to move the chosen folder(s) across to the **Selected** section.
7. To continue, select the **OK** button.
8. In the **User Status** section, select the down arrow in the **User Status** field and select the appropriate action from the drop-down list that displays.
9. To accept the user profile request, select **Active**.
10. To reject the user profile request, select **Revoked**.
11. To save the changes to the user’s profile, select the **Save** button.
12. In the Save Changes dialog box, select the **Yes** button.

The Manage Users screen will display informing you the changes you have made to the user’s profile may not be visible in the Data Portal for a few minutes.

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