



## Update a User's Profile

If you are a *User Administrator* for your organisation, you will be able to make changes to user profiles in the Data Portal for any 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.

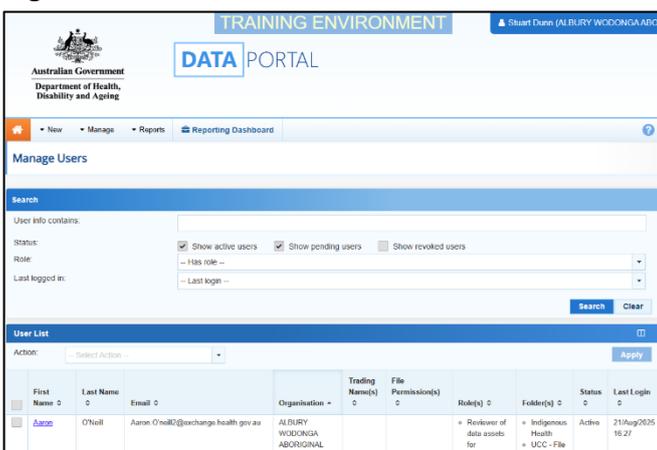
To update a user profile in the Data Portal:

1. Open the Data Portal through [Health Data Portal](#).
2. Log in using the information provided in the [Register for and Log In 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 profiles within your organisation.



If your organisation is part of a Parent/Child structure with multiple sites, you will see the *Only show Users in Organisation* field here as well.

⚠️ If needed, you can search for a particular user by entering their name in the *User info contains* field before searching. You can also search for users who have had their profiles

removed by selecting the *Show revoked users* check box and de-selecting the others before searching.

4. If your organisation has multiple sites, and the user whose record you are looking for resides in another site within your structure, select  in the **Only show Users in Organisation** field and select the user's site from the list.

⚠️ You can select  in the header of the required column (for example **Last Name**) to reorder the user records if needed.

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

The User Details screen will display.

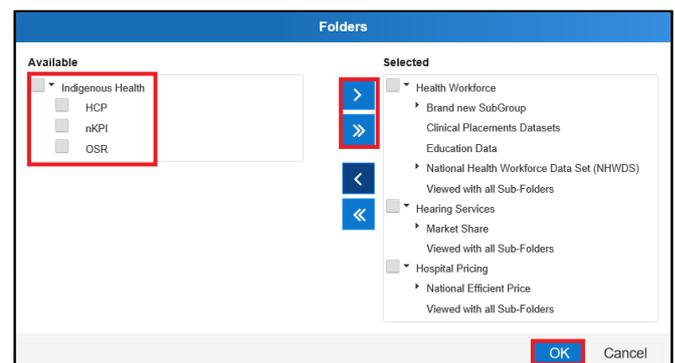
6. To open the user's profile for editing, select at the top of the screen.

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

7. 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.
8. 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 published data assets a user within your organisation will be able to see in the Data Portal. File permissions will generally be assigned by a Departmental administrator so you can move past this section.

9. In the **Folders** section, select **Edit**.
10. In the **Available** section of the Folders window, 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.

- To continue, select
- If you need to revoke the user's profile, select  in the **User Status** cell and select **Revoked**.
- Select  in the **Reason** cell and select the applicable reason for the user's profile being revoked.
- To save the changes to the user's profile, select
- In the Save Changes window, select

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

## Update Your Own User Profile

As *User Administrator*, you can also update your own user profile if/when needed. 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:

- Ensure the Data Portal home screen is displayed.
- Select next to your name in the top right-hand corner of the screen and select **Manage My User Profile** from the list that displays.



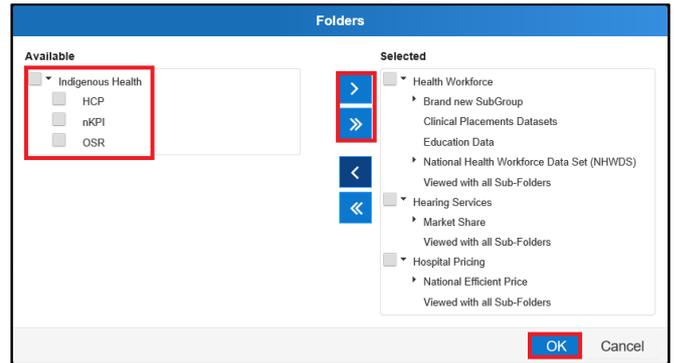
The User Details screen will display.

- 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.

- If needed, you can update your contact details, including your email address, in the **Contact Information** section.

- In the **Roles** section, select or deselect the relevant check box to add or remove a role to/from your user profile.
- In the **Folders** section, select
- In the Folders window, select the check boxes for the folders to be added to your user profile and select
- To continue, select



- To save the changes, select
- In the Save Changes window, select

The changes will be applied to your user profile.

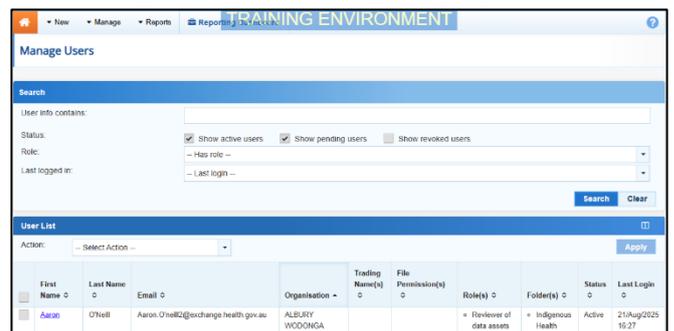
## Process an Alternate User Profile Request

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

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

- Ensure the Data Portal home screen is displayed.
- From the Data Portal home screen, select and then select **Users** from the list that displays.

The Manage Users screen will display.





A list of all users with a profile in your organisation will display here, including *Pending* profiles for users from other organisations that have requested a profile in your organisation.

The *Status* column will display the status of all user profiles within your organisation.

- To action a user profile request, select the link in the **First Name** column for the user who has requested a profile in your organisation.

The *User Details* screen will display.

- 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.

If you don't want to give the user access for your organisation, go to the *User Status* field at the bottom of the screen, select , select *Revoked*, select the applicable reason and then select

- In the **Roles** section, select the applicable check box(es) for the role(s) to be added to the new user profile.
- In the **Folders** section, select .
- In the **Available** section of the Folders window, select the check boxes for the folders to be added to the user's profile and select .
- To continue, select .
- In the **User Status** section, select in the **User Status** field and select **Active** from the drop-down list that displays.
- To save the changes to the profile, select .
- In the Save Changes window, select .

The *Manage 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.

If you have several alternate user profile requests to action, you can use the bulk update function, as detailed below.

## Use the Bulk User Update Function

If you are a *User Administrator* that manages multiple organisations or sites, you can use the bulk update function to easily update multiple profiles at once. For example, you may need to revoke all the profiles for a particular user as they have left your organisation.

To use the bulk user update function:

- Ensure the Data Portal home screen is displayed.
- From the Data Portal home screen, select and then select **Users** from the list that displays.

The *Manage Users* screen will display.

- Enter the name of the user whose profiles you need to update in the **User info contains** field.
- To display all profiles for the user, select .
- To perform an action on all the user's profiles, select the check box on the left-hand side of the screen, next to **Last Name**.
- In the **Action** field, select and select either **Set to Active** or **Set to Revoked**, depending on what you need to do.
  - If you select **Set to Active** here to activate multiple *Pending* profiles for a user, the **Assign role** field will display, allowing you to assign the required role(s) to the profiles you are activating so you don't need to do this as a separate step.
  - If you select **Set to Revoked** here to revoke the user's Data Portal profiles,



the **Reason** field will display here, asking you to specify why the user's profiles are being removed.

7. To complete the action, select [Apply](#).