



Australian Government

**Department of Health
and Aged Care**

**HEALTH DATA PORTAL
USER
ADMINISTRATION FOR
HEALTH SERVICES**

28 FEBRUARY 2023

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About This Guide

The *Health Data Portal User Administration for Health Services* user guide has been developed to help Health Data Portal *User Administrators* within health services perform the functions required to maintain their users within the Health Data Portal, and ensure they are ready to submit the required reports through the Data Portal each reporting round.

To do this, health service *User Administrators* are required complete the following functions in the Data Portal:

- Update user profiles for users within their health service, so these users can perform the required tasks in the Data Portal such as updating and submitting reports
- Approve/reject new user profile requests from users from other health services who request the creation of profiles within the *User Administrator's* health service
- Where the health service has multiple delivery sites, complete user profiles for users who request a profile in different sites within the service
- Provide general support to users in their health service in their use of the Data Portal.

This user guide provides health service *User Administrators* with detailed instructions on how to complete each of the above tasks in the Data Portal.

Version History

This section details the different versions of this user guide and what they contain, allowing you to decide if/when you need to download an updated version of the guide for your use.

Version Number	Date	Change
1.0	28 February 2024	Original version

Manage User Profiles

In the Data Portal, health service *User Administrators* will need to maintain user profiles for users within their health service.

Certain users within each health service will be given the *User Administrator* role in the Data Portal, which will allow them to:

- Add roles, folders, and file permissions to user profiles for users within their health service, as they register in the Data Portal.
- Action user profile creation requests for users in other health services who request a profile in the *User Administrator's* organisation.
- Add and remove roles and folders to and from their own user profile as required to allow them to perform the required roles for their health service.

Update/Complete a User's Profile

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

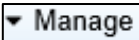
When a user within your health service registers in the Data Portal and has a profile automatically created for them, they will not have any roles or have access to any folders - you will need to set this up for them as the *User Administrator*.

There may be times as well when you need to revoke a user's Data Portal profile as the user has left the organisation or no longer requires access to the Data Portal.




You should revoke a user's profile as soon as possible once that user no longer requires access to the Data Portal.


The following procedure is used to update/complete a user's profile in the Data Portal.



1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed.
2. From the menu bar on the Data Portal home screen, select  and then select **Users**.

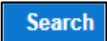
The Manage Users screen will display, listing all the registered, active users within your health service.

Manage Users								
Search								
Only show Users containing: <input type="text"/>								
<input checked="" type="checkbox"/> Show active users <input checked="" type="checkbox"/> Show pending users <input type="checkbox"/> Show revoked users								
<input type="button" value="Search"/> <input type="button" value="Clear"/>								
User List								
First Name	Last Name	Email	Organisation	Trading Name(s)	File Permission(s)	Role(s)	Folder(s)	Status
DirectLoad	DirectLoad	DirectLoad@health.gov.au	Coogera Aboriginal Health Service			<ul style="list-style-type: none"> Uploader of data assets for submission 		Active
Stuart	Dunn	Stuart.Dunn@health.gov.au	Coogera Aboriginal Health Service			<ul style="list-style-type: none"> Approver of data assets for submission Uploader of data assets for submission User Administrator Interactive Report Viewer Reviewer of data assets for submission 	<ul style="list-style-type: none"> Indigenous Health 	Active

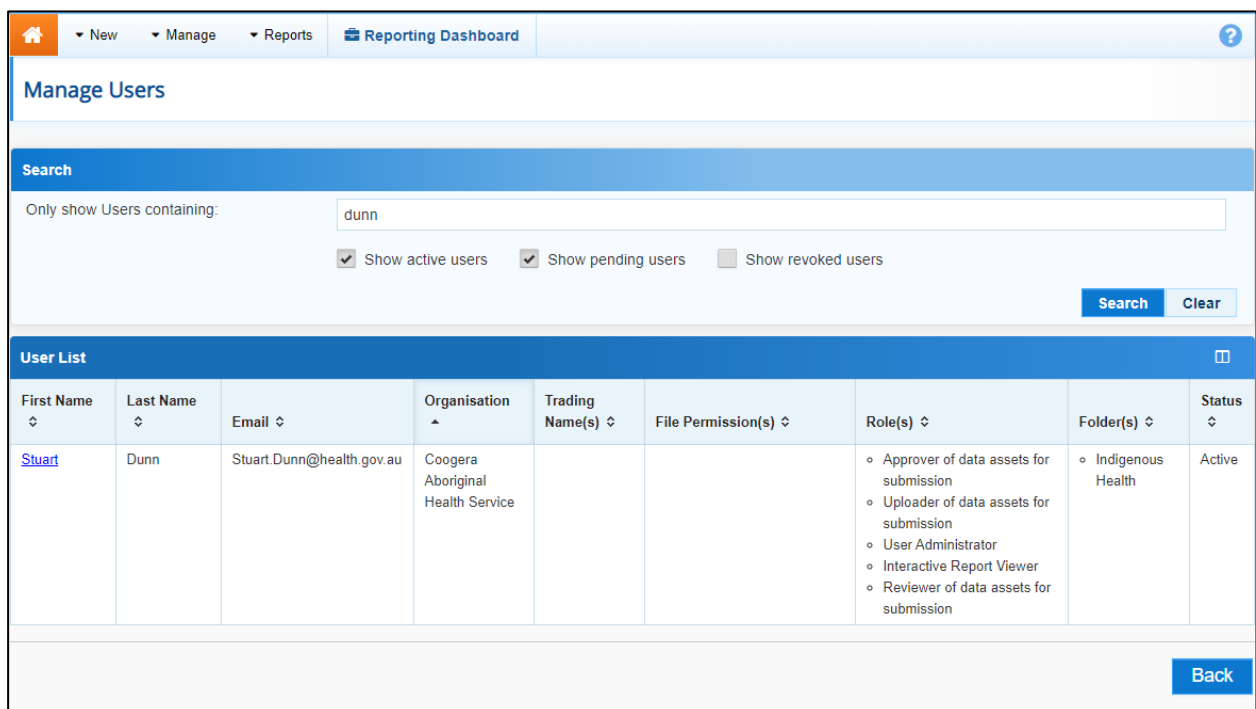
 By default, only users with *Active* and *Pending* profiles will display. If you wish to see *Revoked* users for your organisation, select the *Show revoked users* check box.

3. If you need to search for the user whose profile is to be updated, enter the user’s name (first name, last name, or both) in the **Only show Users containing** field.
4. If your health service has multiple service delivery sites, you will see the **Only show Users in Organisation** field as well. If the user whose profile you are updating is in another site within your service, select  in the **Only show Users in Organisation** field and select the site from the list.

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

5. To search for the user’s profile once you have entered the required search criteria, select .

A list of matching users will display.




The screenshot shows the 'Manage Users' interface. At the top, there are navigation tabs: 'New', 'Manage', 'Reports', and 'Reporting Dashboard'. Below this is a search section with a text input field containing 'dunn'. There are three checkboxes: 'Show active users' (checked), 'Show pending users' (checked), and 'Show revoked users' (unchecked). 'Search' and 'Clear' buttons are on the right. Below the search section is a 'User List' table with columns: First Name, Last Name, Email, Organisation, Trading Name(s), File Permission(s), Role(s), Folder(s), and Status. A 'Back' button is at the bottom right.

First Name	Last Name	Email	Organisation	Trading Name(s)	File Permission(s)	Role(s)	Folder(s)	Status
Stuart	Dunn	Stuart.Dunn@health.gov.au	Coogera Aboriginal Health Service			<ul style="list-style-type: none"> Approver of data assets for submission Uploader of data assets for submission User Administrator Interactive Report Viewer Reviewer of data assets for submission 	Indigenous Health	Active

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

The User Details screen for the selected user will display.

The screenshot shows the 'User Details' screen for Stuart Dunn. At the top, there is a navigation bar with 'New', 'Manage', 'Reports', and 'Reporting Dashboard' menus. The environment is labeled 'TRAINING ENVIRONMENT'. The user's name is 'Stuart Dunn' and their organization is 'Departmental Internal Staff'. The profile information includes: Name: Stuart Dunn, Organisation: Coogera Aboriginal Health Service, Trading Names: (empty), Home Organisation: Departmental Internal Staff, Home Organisation Trading Names: (empty), and Default Profile: No. The 'Contact Information' section has input fields for Contact Number 1, Contact Number 2, and Email (Stuart.Dunn@health.gov.au). The 'Role(s)' section lists three roles: 'Uploader of data assets for submission', 'Reviewer of data assets for submission', and 'Approver of data assets for submission', all of which are currently unselected.

- To open the user’s profile for updating/completion, select  in the top right-hand corner of the screen.

The User Details screen will update so the user’s profile can be updated.

The screenshot shows the 'User Details' screen for Abhishek Tiwary. The environment is 'TRAINING ENVIRONMENT'. The user's name is 'Abhishek Tiwary' and their organization is 'Departmental Internal Staff'. The profile information includes: Name: Abhishek Tiwary, Organisation: ALBURY WODONGA ABORIGINAL HEALTH SERVICE INCORPORATED, Trading Names: (empty), Home Organisation: Departmental Internal Staff, Home Organisation Trading Names: (empty), Home Organisation User ID: tiwara, and Default Profile: No. The 'Contact Information' section has a message 'You may only edit your own contact numbers.' and input fields for Contact Number 1, Contact Number 2, and Email (Abhishek.Tiwary@exchange.health.gov.au). The 'Role(s)' section lists three roles: 'Uploader of data assets for submission', 'Reviewer of data assets for submission', and 'Approver of data assets for submission'. The first two roles are now checked, while the third remains unchecked. An 'EDITING' button with a pencil icon is visible in the top right corner.

- If needed (the user may have entered their email address incorrectly when they registered) update the user’s email address in the **Email** field.
- In the **Roles** section, select the relevant check box(es) to add the applicable roles to the user’s profile.

Role(s)

- Uploader of data assets for submission
- Reviewer of data assets for submission
- Approver of data assets for submission
- Receiver of data assets for submission
- User Administrator
- Interactive Report Viewer
- Interactive Report Developer
- Viewer of Processed Data in submission

The role or roles an end user has will determine the tasks they can perform in the Data Portal. For example, if an end user is given the *Uploader of data assets for submission* role (known as *Submission Uploader*) they will be able to submit data assets in the Data Portal. That user would not be able to approve the data asset submissions of other users in their health service, however, unless they were also given the *Approver of data assets for submission* (*Submission Approver*) role.

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

The Folders dialog box will display.

Folders

<p>Available</p> <div style="border: 1px solid #ccc; padding: 5px;"> <ul style="list-style-type: none"> <input type="checkbox"/> Indigenous Health <ul style="list-style-type: none"> <input type="checkbox"/> Activity Work Plan <input type="checkbox"/> HCP <input type="checkbox"/> nKPI <input type="checkbox"/> OSR <input type="checkbox"/> Performance Report ▼ This is a test folder <ul style="list-style-type: none"> <input type="checkbox"/> Stuart's Test Sub-folder </div>	<div style="display: flex; flex-direction: column; justify-content: center; gap: 10px;"> > >> < << </div>	<p>Selected</p> <p style="color: #ccc;">No folders selected</p>
<div style="display: flex; justify-content: flex-end; gap: 20px;"> OK Cancel </div>		

11. In the **Available** section on the left-hand side of the dialog box, under the **Indigenous Health** check box, select the check box for each report your health service is required to submit. If your service submits all reports, simply select the **Indigenous Health** check box and the other check boxes will automatically be selected.

12. To add the selected folders to the user's profile, select >.



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.


13. To continue, select OK.


The User Details screen will again display, and the selected folders will be now listed for the user.



A screenshot of a user profile form. At the top, there is a dropdown menu labeled 'Indigenous Health' with a small square icon to its left. Below this menu, there are five checkboxes, each followed by a label: 'Activity Work Plan', 'HCP', 'nKPI', 'OSR', and 'Performance Report'. All checkboxes are currently unchecked.

 In the *User Status* field at the bottom of the screen, you can select  and select either *Pending* to delay activating the user's profile or **Revoked** if the user's profile needs to be deactivated for some reason (e.g., they have left the organisation or no longer need access to the Data Portal).

14. To save the changes to the user's profile, select . The Save Changes dialog box will display.

15. In the Save Changes dialog box, select . The changes to the details will be applied to the user's profile.

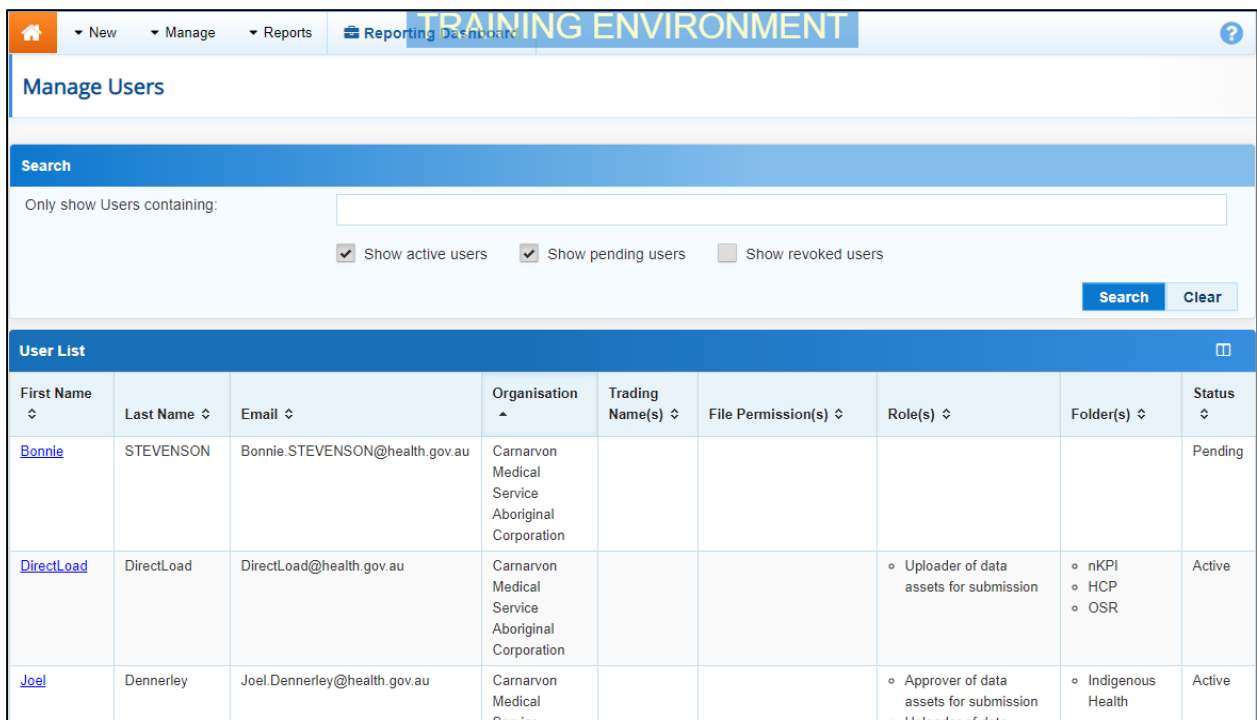
Process Alternate User Profile Requests

When a user requests a profile in another site within your health service, as the *User Administrator*, you will receive an email informing you a request has been submitted. You can then action the request as required.

The following procedure is used to process an alternate user profile request in the Data Portal as a *User Administrator*.

1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed.
2. From the menu bar on the Data Portal home screen, select **Manage** and then select **Users**.

The Manage Users screen will display.



First Name	Last Name	Email	Organisation	Trading Name(s)	File Permission(s)	Role(s)	Folder(s)	Status
Bonnie	STEVENSON	Bonnie.STEVENSON@health.gov.au	Carmarvon Medical Service Aboriginal Corporation					Pending
DirectLoad	DirectLoad	DirectLoad@health.gov.au	Carmarvon Medical Service Aboriginal Corporation			<ul style="list-style-type: none"> Uploader of data assets for submission 	<ul style="list-style-type: none"> nKPI HCP OSR 	Active
Joel	Dennerley	Joel.Dennerley@health.gov.au	Carmarvon Medical Service			<ul style="list-style-type: none"> Approver of data assets for submission 	<ul style="list-style-type: none"> Indigenous Health 	Active

A list of all users with profiles in your health service will display in the User List section, including the new user profile request with the status of *Pending*.

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

The User Details screen will display.

Departmental Internal Staff
Bonnie STEVENSON

Name: Bonnie STEVENSON
 User Id: 716470624
 Organisation: Carnarvon Medical Service Aboriginal Corporation
 Trading Names:
 Home Organisation: Departmental Internal Staff
 Home Organisation Trading Names:
 Default Profile: No

Contact Information

You may only edit your own contact numbers.


Contact Number 1
 Contact Number 2
 Email * Bonnie.STEVENSON@health.gov.au

Role(s)

4. To update the user’s profile, select  in the top right-hand corner of the screen.

The User Details screen will update to allow you to edit the user’s profile.

Departmental Internal Staff
Bonnie STEVENSON

+ EDITING 

Name: Bonnie STEVENSON
 User Id: 716470624
 Organisation: Carnarvon Medical Service Aboriginal Corporation
 Trading Names:
 Home Organisation: Departmental Internal Staff
 Home Organisation Trading Names:
 Default Profile: No

Contact Information

You may only edit your own contact numbers.

Contact Number 1
 Contact Number 2
 Email * Bonnie.STEVENSON@health.gov.au

Role(s)

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

Role(s)





- Uploader of data assets for submission
- Reviewer of data assets for submission
- Approver of data assets for submission
- Receiver of data assets for submission
- User Administrator
- Interactive Report Viewer
- Interactive Report Developer
- Viewer of Processed Data in submission



The role or roles an end user has will determine the tasks they can perform in the Data Portal. For example, if an end user is given the *Uploader of data assets for submission (Submission Uploader)* role, they will be able to submit data assets in the Data Portal. That user would not be able to approve the data asset submissions of other users in their health service, however, unless they were also given the *Approver of data assets for submission (Submission Approver)* role.

6. In the **Folders** section, select .


The Folders dialog box will display.


Folders

Available		Selected
<input type="checkbox"/> Indigenous Health <ul style="list-style-type: none"> <input type="checkbox"/> Activity Work Plan <input type="checkbox"/> HCP <input type="checkbox"/> nKPI <input type="checkbox"/> OSR <input type="checkbox"/> Performance Report 	<div style="margin-bottom: 10px;"></div> <div style="margin-bottom: 10px;"></div> <div style="margin-bottom: 10px;"></div> <div></div>	No folders selected
<input type="checkbox"/> This is a test folder <ul style="list-style-type: none"> <input type="checkbox"/> Stuart's Test Sub-folder 		

7. In the **Available** section on the left-hand side of the dialog box, under the **Indigenous Health** check box, select the check box for each report your health service is required to submit. If your service submits all reports, simply select the **Indigenous Health** check box and the other check boxes will automatically be selected.

8. To add the selected folders to the user's new profile, select .

 **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.

9. To continue, select .

The User Details screen will again display, and the selected folders will be listed for the user.



10. In the **User Status** section, select in the **User Status** field and select the appropriate action from the drop-down list that displays.
 - i. To *accept* the user profile request, select **Active**.
 - ii. To *reject* the user profile request, select **Revoked**.

11. To save the changes to the profile, select .

12. In the Save Changes dialog box, select .

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 immediately.


TRAINING ENVIRONMENT								
Search								
Only show Users containing: <input type="text"/>								
<input checked="" type="checkbox"/> Show active users <input checked="" type="checkbox"/> Show pending users <input type="checkbox"/> Show revoked users								
								<input type="button" value="Search"/> <input type="button" value="Clear"/>
User List ⌵								
First Name ⌵	Last Name ⌵	Email ⌵	Organisation ▲	Trading Name(s) ⌵	File Permission(s) ⌵	Role(s) ⌵	Folder(s) ⌵	Status ⌵
Bonnie	STEVENSON	Bonnie.STEVENSON@health.gov.au	Carnarvon Medical Service Aboriginal Corporation					Pending
DirectLoad	DirectLoad	DirectLoad@health.gov.au	Carnarvon Medical Service Aboriginal Corporation			• Uploader of data assets for submission	• nKPI • HCP • OSR	Active
Joel	Dennerley	Joel.Dennerley@health.gov.au	Carnarvon Medical Service				• Indigenous Health	Pending

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

Update Your Own User Profile

As a *User Administrator* in the Data Portal, you can update your own profile in addition to updating profiles for other users within your health service.


The following procedure is used to update your own user profile in the Data Portal.

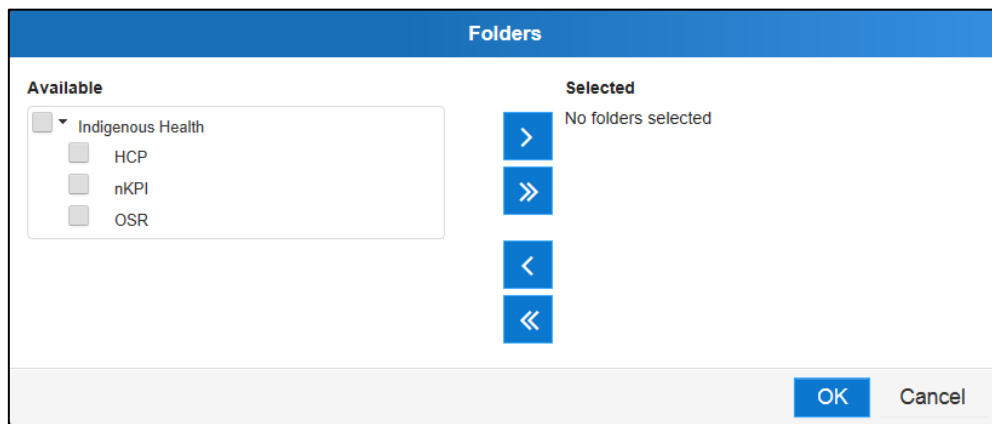
1. Ensure you have logged in to the Data Portal and the Data Portal home screen is displayed.
2. Select  next to your name in the top right-hand corner of the screen and select **Manage My User Profile** from the list that displays.



The User Details screen will display.

3. To edit your user details, select  in the top right-hand corner of the screen.

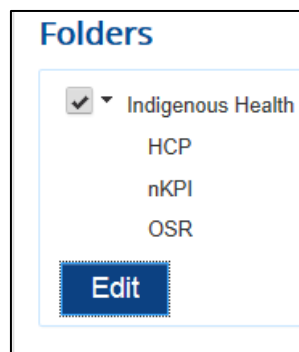
The User Details screen will update so your profile can be edited.



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 Folders dialog box will display.



6. In the **Available** section on the left-hand side of the dialog box, under the **Indigenous Health** check box, select the check box for each report your health service is required to submit. If your service submits all reports, simply select the **Indigenous Health** check box and the other check boxes will automatically be selected.
7. To add the selected folders to your profile, select .
8. To continue, select .

The User Details screen will again display, and the selected folders will be listed.



9. To save the changes to your profile, select .
- The Save Changes dialog box will display.
10. In the Save Changes dialog box, select .
- The changes will be applied to your user profile.