

Create a New Folder

As a Folder Administrator in Health, you are able to create and update folders in the Data Portal as needed.

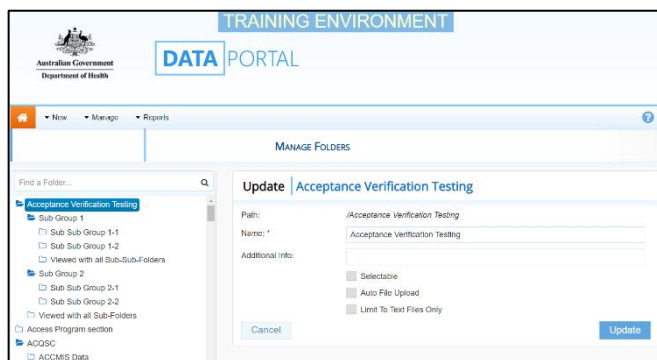
To create a new folder record in the Data Portal:

1. Open the Data Portal through [Health Data Portal](#).
2. Log in using the information provided in the *Registering for and Logging 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 **Folders** from the list that displays.


The Manage Folders screen will display.






4. To create the new folder, right click anywhere in the left-hand section of the screen.

 To create a sub-folder under an existing folder, right click on the folder and select *Create Sub Folder*.

5. Select **Create Top Level Folder**.
6. Complete the fields on the screen as described below.

 * indicates a mandatory field.

Field	Description
Name*	Enter the name of the new folder. This must be unique for the level the folder is being created on.
Additional Info	Enter any additional information about the folder. This field is limited to 254 characters.
Selectable	Select this check box to ensure the folder is selectable when users register for the Portal. Applicable for top level folders only.

Field	Description
	 Selecting the check box will reveal the Contact email field.
Contact email	Enter the email address or addresses emails are to be sent to when users register for the folder in the Data Portal and no one else in their organisation is registered. Applicable for top level folders only.  This field will only display if the Selectable check box has been selected.
Auto File Upload	Select this check box if you want data assets submitted for this folder to be automatically saved once they are approved.  Selecting the check box will reveal the Export Folder Path field.
Export Folder Path*	Enter the export folder path if you have selected the Auto File Upload check box.
Limit To Text Files Only	Select the check box if you want the folder to only contain text files.

7. To continue, select **Save**.

The new folder has now been created in the Data Portal.

Clone a Folder

If you need to create a folder that is very similar to one that already exists, you can clone that existing folder rather than creating a new folder from scratch.

To clone a folder in the Data Portal:

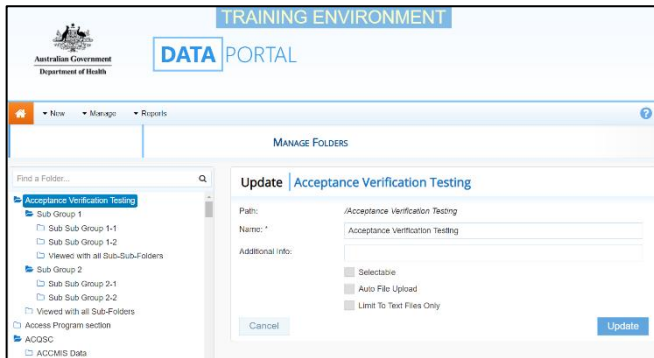
1. Open the Data Portal through [Health Data Portal](#).
2. Log in using the information provided in the *Registering for and Logging in to the Health Data Portal* QRG.

The Data Portal Home screen will display.

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

Manage Folders and File Permissions (Health Administrators)

The Manage Folders screen will display.



- To clone a folder, right click on the folder to be cloned and select **Clone Folder**.
- Change the name of the folder and update any other details as needed.
- To continue, select **Save**.

The new folder has now been created, using the attributes of an existing folder.

Update a Folder's Attributes

Once a folder has been created and is being assigned to your users as needed, you can update the folder's attributes as/if needed.

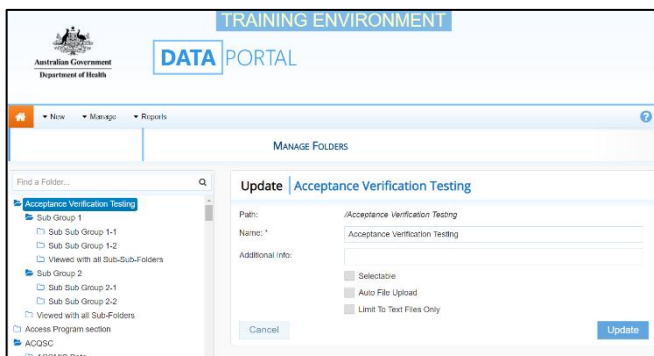
To update a folder's attributes in the Data Portal:

- Open the Data Portal through [Health Data Portal](#).
- Log in using the information provided in the *Registering for and Logging in to the Health Data Portal* QRG.


The Data Portal Home screen will display.

- From the Data Portal Home screen, select **Manage** and then select **Folders** from the list that displays.

The Manage Folders screen will display.



- To search for the folder to update, enter the folder's name (or part of the name) in the **Find a Folder...** field on the left-hand side of the screen.



- To search for the folder, select .
- Select the folder from the list that displays.

The Manage Folders screen will update to display the folder's details on the right-hand side of the screen.

- Complete the fields on the screen as described below.



* indicates a mandatory field.

Field	Description
Name*	Update the name of the folder if required.
Additional Info	Enter any additional information that is required for the folder.
Selectable	Select/deselect the check box as needed.  Please note that if the check box is deselected, the <i>Contact email</i> field will no longer display.
Contact email	Update the contact email for the folder if needed
Auto File Upload	Select/deselect the check box as needed.  Please note that if the check box is deselected, the <i>Export Folder Path</i> field will display.
Export Folder Path*	Enter the export folder path as needed.
Limit To Text Files Only	Select the check box.

- To save changes to the folder, select **Update**.

The folder's attributes have now been updated.

Manage Folders and File Permissions (Health Administrators)

Create a New File Permission

As a File Permission Administrator, you are able to create and update file permissions in the Data Portal as needed.

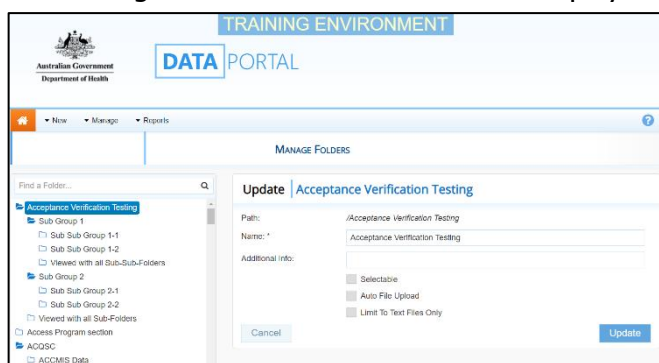
To create a new file permission record in the Data Portal:

1. Open the Data Portal through [Health Data Portal](#).
2. Log in using the information provided in the *Registering for and Logging 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 **File Permissions** from the list that displays.

The Manage File Permissions screen will display.



4. To create a new file permission, select **+** in the top right-hand corner of the screen.

The Manage File Permissions screen will update to display the New | File Permission Name field on the right-hand side of the screen.

5. In the **Name** field, enter the name of the new file permission to be assigned.
6. To continue, select **Save**.

The new file permission has now been saved and can be assigned to the applicable users as needed.

Update a File Permission's Attributes

To change the name of a file permission record in the Data Portal:

1. Open the Data Portal through [Health Data Portal](#).
2. Log in using the information provided in the *Registering for and Logging 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 **File Permissions** from the list that displays.

The Manage File Permissions screen will display.

4. On the left-hand side of the screen, select the file permission to be updated.



If needed, enter the name of the File Permission to be updated in the search field at the top of the screen.

5. In the **Name** field on the right-hand side of the screen, update the name of the file permission as needed.
6. To save changes to the file permission, select **Save**.

The file permission's name has now been updated.