

# Horus ePortfolio – User management

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## Locations

The Horus ePortfolio database has been set up to contain all HEE locations in the following format:

- HEE local office
  - o Foundation School
    - NHS Acute Trust
      - Hospital/Site

All users need to be allocated to at least one location on this tree.

## Permissions/Roles

Permission name	User type	Possible location level(s)
Foundation School Director	User	Foundation School
Foundation School Manager	User	Foundation School
Administrator	User	HEE local office Foundation School Trust Hospital/Site
Foundation Programme Director	User	Trust Hospital/Site
Trainer	User	Trust Hospital/Site
ARCP Panel Member	User	Trust Hospital/Site
Foundation Doctor (FD)	Foundation Doctor	HEE local office Foundation School Trust Hospital/Site
Non-training grade (NTG)	Foundation Doctor	HEE local office Foundation School Trust Hospital/Site

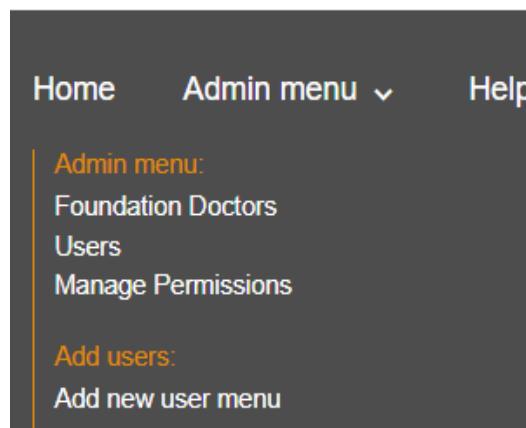
## Admin Menu

User management is split into the following categories:

- Foundation Doctors
  - o NTGs also listed here
- Users (all users other than FDs/NTGs)
- Manage permissions
- Add users

The location that you wish to view/search is picked on any of the pages above (your options are just the location(s) you have permission(s) for). Your selection is remembered throughout the site and can be updated at any point.

## Horus ePortfolio



### Foundation Doctors/NTGs

Selecting this link will take you to a list of all FDs/NTGs within the location you have selected. Here you can

- o Search for FDs/NTGs
- o View portfolios
- o Manage rotations (inc supervisors)
- o Edit (or check) account details

### Users

Selecting this link will take you to a list of all users within the location you have selected. Here you can

- o Search for users
- o Edit (or check) account details
- o Add (or check) permissions
  - You cannot delete permissions here – see ‘Manage permissions’ below for this

### Manage permissions

Selecting this link will take you to a list of all users within the location you have selected. Here you can

- o Add and delete (“revoke”) permissions
  - Start typing the name of the user whose permissions you want to edit into the “Choose user” box
  - You need to select the exact location level for which you want to add/revoke permissions

- View current employee permissions for your selected location
  - You can search this list (“Start typing to filter the results in the table”)

## Organisation User Permissions

[Leicestershire, Northamptonshire and Rutland \(LNR\) Foundation School](#) *click to change*

Add permissions to Leicestershire, Northamptonshire and Rutland (LNR) Foundation School

**Choose user:**

**Choose permissions:**

Please choose user

Current employee permissions for Leicestershire, Northamptonshire and Rutland (LNR) Foundation School

Start typing to filter the results in the table:

Name ▲

Permission

## Add users

Selecting the “add new user” link will take you to list of user types you can add. There are instructions on the details you need to add each user type.

### Adding users to Horus

Below are instructions for how to add different types of users to Horus.

#### Add foundation doctor / NTG doctor

**NOTE:** NTG doctors who will be using Horus to record their own assessments and achievements should be added using this section.

You'll need to know their email address, all other details will be pre-populated from the GMC full register.

Add foundation doctor / NTG doctor

#### Add doctor

e.g. to be FPD, supervisor, SLE assessor etc.

**NOTE:** NTG doctors who will be using Horus to record their own assessments and achievements should be added using the “Add foundation doctor / NTG doctor” section above.

You'll need to know their email address, all other details will be pre-populated from the GMC full register.

Add doctor

#### Add other user

Admins, non-doctor trainers and all others can be added here.

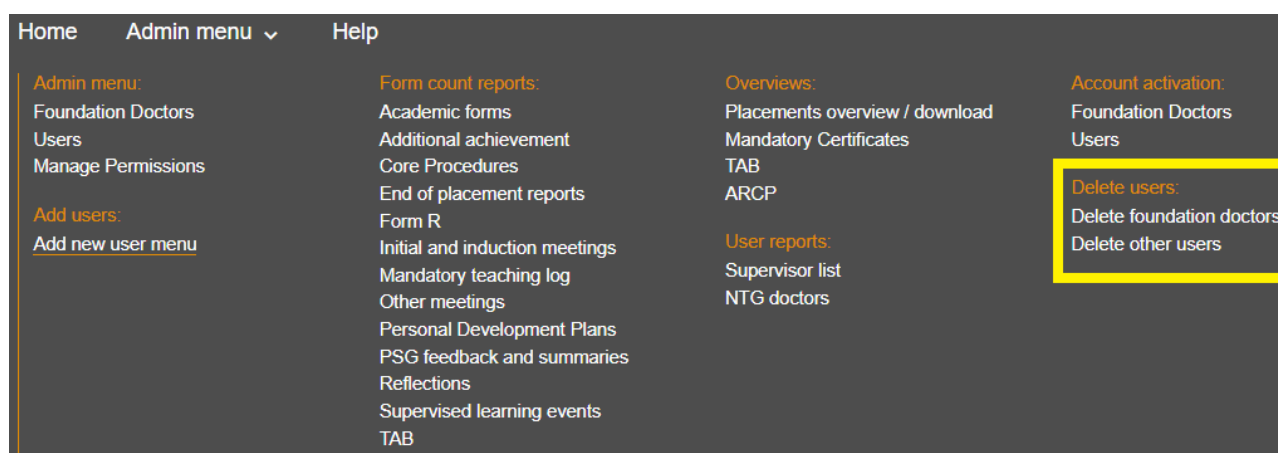
You'll need to know their name and email address.

Add other user

## Delete users

There are two user types in Horus:

- Foundation Doctor (includes FDs and NTGs)
  - o Can be deleted if their e-portfolio is empty
  - o Must belong to one of your locations (or not belong to any locations)
- User (includes all other users)
  - o Employee-type users (supervisors, trainers, administrators, etc) cannot be deleted.
  - o If they no longer need access to Horus, revoke all their current permissions. They'll then no longer be able to perform any actions on the system, although they will still be able to log in to view any content they may have created in the past.



## Permissions – what do they mean

### - Trust and Site level:

- Foundation Programme Director  
(Selecting this option will give the user FPD, trainer and administrator permissions for the relevant organisation.)
- Administrator  
(Selecting this option will give the user administrator permission for the relevant organisation and automatically give the user trainer permissions.)
- Trainer  
(Selecting this option will give the user permission to be linked as a supervisor to foundation doctors and complete forms for relevant foundation doctors.)
- ARCP Panel Member  
(Selecting this option should only be used when the user only uses Horus as an ARCP panel member. Trainers and admins can already be added to ARCP panels, therefore they don't need to be assigned the ARCP panel member role.)

- Radio buttons – you can only select one of these
- Check boxes – you can select as many as you like, with or without a radio button selected

- Foundation School level:

Foundation School Director

*(Selecting this option will give the user FSD, trainer and administrator permissions for the relevant organisation.)*

Foundation School Manager

*(Selecting this option will give the user FSM, trainer and administrator permissions for the relevant organisation.)*

Administrator

*(Selecting this option will give the user administrator and trainer permission for the relevant organisation.)*

- Local Office level:

Administrator

*(Selecting this option will give the user administrator permission for the relevant organisation and automatically give the user trainer permissions.)*