

# 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 (ie '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
Read only	User	HEE local office Foundation School Trust Hospital / Site
Analyst	User	HEE local office Foundation School Trust Hospital / Site
Foundation Doctor	Foundation Doctor	HEE local office Foundation School Trust Hospital / Site

## Admin Menu

User management is split into the following categories:

- Foundation Doctors (FDs)
- Users (ie all users other than FDs)
- 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.

### Foundation Doctors

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

- View portfolios
- Manage rotations (inc supervisors)
- Update personal details

### Users

Clicking this link will take you to a search page. You can either search for a specific user or leave all the fields blanks and click “Search” – this will bring up all users within the location you have selected. Here you can

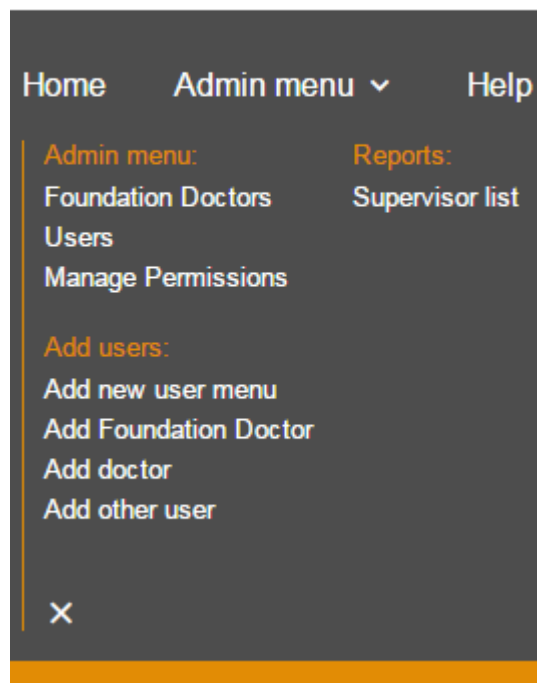
- Search for a user
- Update details
- Update permissions

### Manage permissions

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

- View the permissions for all users with access to your selected location
  - You can search this list (*“Start typing to filter the results in the table”*)
- Update permissions
  - Start typing the name of the user whose permissions you want to edit into the “Choose user” box.

## Horus ePortfolio



## 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
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## Add users

Clicking the “add new user” link will take you to list of new 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

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

[+ Add Foundation Doctor](#)

#### Add Doctor

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

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.

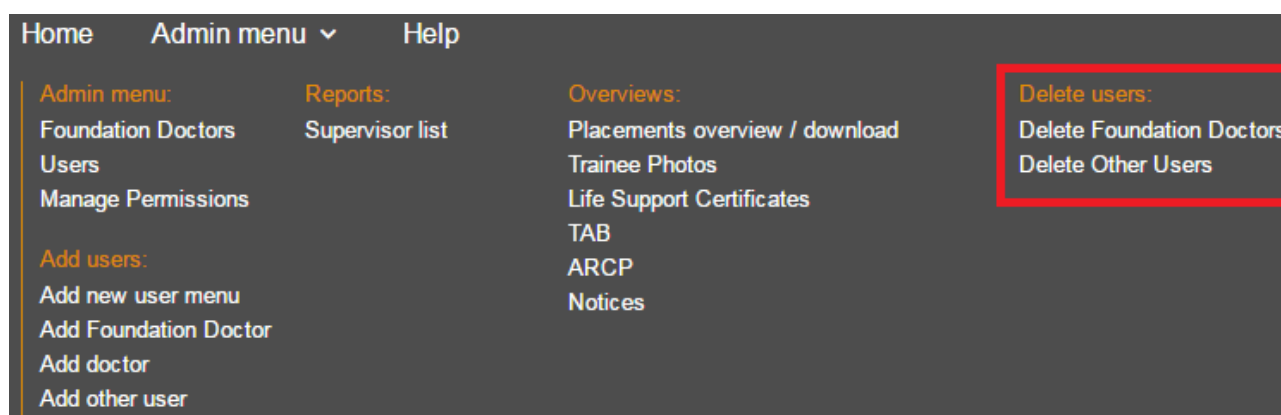
[+ Add other user](#)

You can also use the quick links in the main menu to add a specific user type.

## Delete users

There are two user types in Horus:

- Foundation Doctor
  - o Can be deleted if their ePortfolios are empty.
  - o They must also belong to one of your locations (or not belong to any locations).
- User
  - o Employee type users (supervisors, trainers, administrators) cannot be deleted. If they no longer need access to Horus simply revoke all their current permissions and they'll no longer be able to perform any actions on the system.



## 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. If this user needs to complete forms for foundation doctors or delivers teaching sessions, also select "Trainer" below.)*
- Trainer  
*(Selecting this option will give the user permission to be linked as a supervisor to foundation doctors, complete forms for relevant foundation doctors or be listed as delivering teaching sessions at the relevant organisation.)*
- Analyst  
*(Selecting this option will give the user permission to run reports at the relevant organisation but no other administrator or trainer permissions.)*

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

Read only  
*(Selecting this option will give the user permission to view foundation doctor portfolios at the relevant organisation but no administrator or trainer permissions.)*

**- 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.)*

Analyst  
*(Selecting this option will give the user permission to run reports at the relevant organisation but no other administrator or trainer permissions.)*

Read only  
*(Selecting this option will give the user permission to view foundation doctor portfolios at the relevant organisation but no administrator or trainer permissions.)*

**- Local Office level:**

Administrator  
*(Selecting this option will give the user administrator permission for the relevant organisation. If this user needs to complete forms for foundation doctors or delivers teaching sessions, they need to also be assigned to either a trust or a hospital.)*

Analyst  
*(Selecting this option will give the user permission to run reports at the relevant organisation but no other administrator or trainer permissions.)*

Read only  
*(Selecting this option will give the user permission to view foundation doctor portfolios at the relevant organisation but no administrator or trainer permissions.)*