

# JRCPTB ePortfolio training user guide December 2013

**GUIDANCE FOR DEANERY,  
POSTGRADUATE CENTRES AND TRUST  
ADMINISTRATOR**

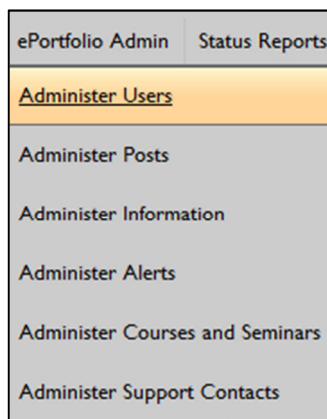
## How to locate a trainee on ePortfolio

Majority of trainees will already have an ePortfolio account, particularly if they have come through from Foundation.

To avoid creating duplicating accounts, please ensure a thorough search is carried out first BEFORE a new account is created.

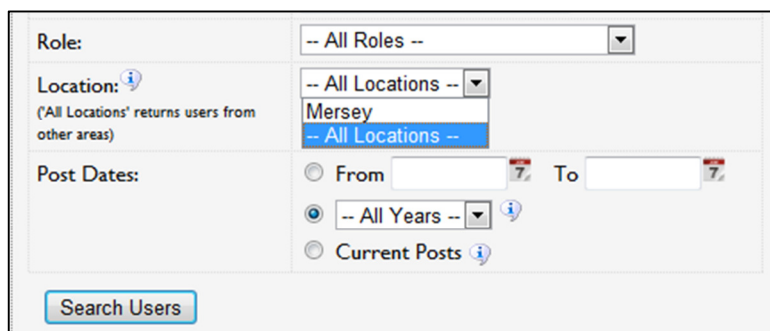
### Step 1:

Once you have logged in using the physician administrator role click on 'Administer Users' menu under the ePortfolio Admin tab.



### Step 2:

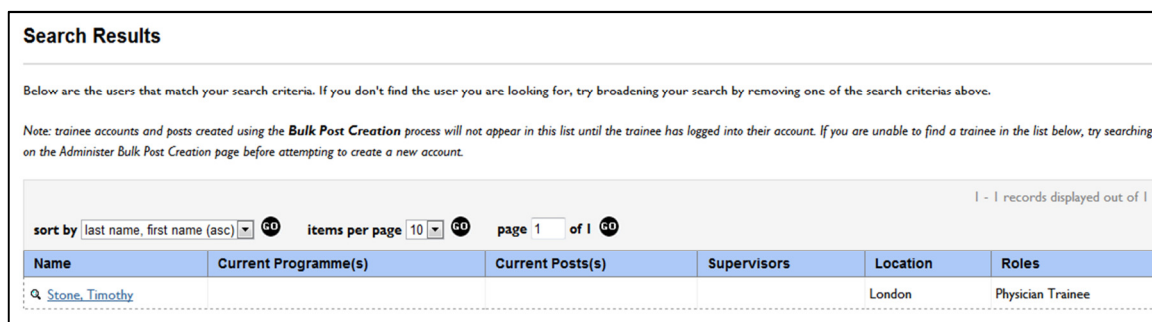
You can search for an account using any of the search fields. If you are unable to locate an account select 'All location' for the search to bring up accounts that are not within your location or have an existing account from Foundation or other Colleges.



The search form includes the following fields and options:

- Role:** A dropdown menu set to '-- All Roles --'.
- Location:** A dropdown menu with an information icon. The text below it says '(All Locations' returns users from other areas)'. The dropdown is open, showing options: '-- All Locations --', 'Mersey', and '-- All Locations --'.
- Post Dates:** Radio buttons for 'From' (with date input fields), '-- All Years --' (selected), and 'Current Posts'.
- A 'Search Users' button at the bottom left.

If an account already exists, this will appear on the screen. Click on the trainee's name to take you to the trainees account.



**Search Results**

Below are the users that match your search criteria. If you don't find the user you are looking for, try broadening your search by removing one of the search criterias above.

*Note: trainee accounts and posts created using the Bulk Post Creation process will not appear in this list until the trainee has logged into their account. If you are unable to find a trainee in the list below, try searching on the Administer Bulk Post Creation page before attempting to create a new account.*

1 - 1 records displayed out of 1

sort by last name, first name (asc) items per page 10 page 1 of 1

Name	Current Programme(s)	Current Posts(s)	Supervisors	Location	Roles
<a href="#">Stone, Timothy</a>				London	Physician Trainee