



Continuing Professional Development Programme

User Reference Manual

Table of Contents

1	Introduction.....	1
1.1	CPD Monitoring.....	1
1.2	Downloading the CPD Policy Document.....	1
2	Security	1
2.1	User Account Setup	1
2.2	Logging In	2
2.3	Changing Password.....	2
2.4	Logging Out	3
3	Working with My Diary.....	4
3.1	Viewing the Diary	4
3.2	Changing the Diary View.....	5
3.2.1	Viewing a different month	5
3.2.2	Changing to Week view	5
3.2.3	Changing to Day view.....	6
3.3	Showing and Hiding Events and Activities	6
4	Working with My Activities	7
4.1	Adding a Personal Activity.....	7
4.2	Viewing/Editing details of a Personal Activity	8
4.2.1	Via the Diary	8
4.2.2	Via the Activities List.....	9
4.3	Removing a Personal Activity.....	10
4.4	Reviewing a Personal Activity	11
4.4.1	Via the Diary	11
4.4.2	Via the Activities List.....	11
4.5	Subscribed Shared Activities.....	11
4.5.1	Accessing the My Shared Activities page	11
4.5.2	Using the My Shared Activities list	12
4.6	All My Activities	12
4.6.1	Accessing All My Activities.....	12
4.6.2	Using the All My Activities list.....	12
5	Working with Shared	12
5.1	Events.....	12
5.1.1	Accessing the Events list	12
5.1.2	Viewing the Event Details	13
5.1.3	Accessing the Event Activities	14
5.1.4	Accessing the Activity Details	15
5.1.5	Adding a Shared Activity	15
5.1.6	Reviewing the Activity	16
5.2	Available Shared Activities	17
5.2.1	Accessing the Shared Activities list.....	17
5.2.2	Using the Shared Activities list.....	17
5.3	All Shared Activities	17
5.3.1	Accessing the All Shared Activities list.....	17
5.3.2	Using the Shared Activities list.....	17

6	Resources	18
6.1	Personal Resources.....	18
6.1.1	Accessing Personal Resources	18
6.1.2	Using the Personal Resources list.....	19
6.2	Add a Personal Resource	20
6.3	Shared Resources	21
6.4	Propose Shared Resource.....	22
7	Reports.....	22
8	My Details.....	23
8.1	Personal Details.....	23
8.1.1	General User Details	23
8.1.2	Addresses.....	24
8.2	Change Password.....	24
8.3	My Profile	24

1 Introduction

The following on-line system has been created to record all Continuing Professional Development (CPD) activities. Participants can view details of events which have been organised, and decide which associated activities they will subscribe to. They can also record all their personal activities in the CPD diary. Appropriate management personnel from the company/organisation will be able to access information recorded on-line by participants.

1.1 CPD Monitoring

This system allows for the allocation of points for activities completed, to keep track of how much time has been spent on activities, or simply to keep track of continued learning. Generally users are required to complete a review form when the activity has been completed and managers can access these to monitor the progress of the individual and to assess the success of the programme as a whole.

1.2 Downloading the CPD Policy Document

Where available, the company/organisation's CPD Policy Document (along with a copy of this manual) is available to download from the CPD system Help page.

2 Security

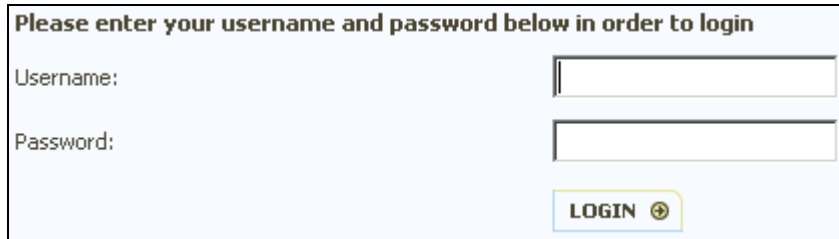
2.1 User Account Setup


The CPD System Administrator should set each user up on the system and provide the user with a Username and Password. The password may be changed by the individual user following their first successful login.

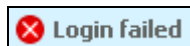
- ➔ In some cases the user may be able to set themselves up on the CPD system.

2.2 Logging In

- Enter the **CPD address** in your browser's **Address Bar** and press **Enter**
- The **LOGIN** page will be displayed



- Enter your **Username** and **Password** (remember that passwords are case-sensitive)
- Press **Enter** or click on 
- If you enter the incorrect **Username** or **Password** the following will be displayed




- When you have logged in successfully the **CPD Home Page** will be displayed

2.3 Changing Password

- ➔ For security reasons we recommend that you change your password after entering the on-line system for the first time.

When creating a new password remember that passwords are **case-sensitive**. You should type in the password in the exact format you require, if necessary using upper and lower case letters where appropriate. When you enter the password a string of asterisks (*) is displayed. It is suggested that you use a password that has both letters and numbers.

Make it something you will remember easily!

- Click the **MY DETAILS** tab at the top-right of the page
- Click **CHANGE PASSWORD** 
- The **CHANGE YOUR PASSWORD** page is displayed


Old Details:


Current Password

New Details:

New Password

Confirm Password

GO 

- Enter your **Current Password** and then your **New Password** (twice) in the appropriate fields
- Press **Enter** or click **GO** 
- A confirmation message will be displayed if you have successfully changed the password, or an error message if there is a problem
- Click **HOME**


2.4 Logging Out


- On the **CPD Home Page** the name of the user logged in is displayed, with a logout link next to it

Welcome to the CPD

Name: Example User [\[logout\]](#) [\[edit details\]](#)

- Click **logout**
- A confirmation message is displayed

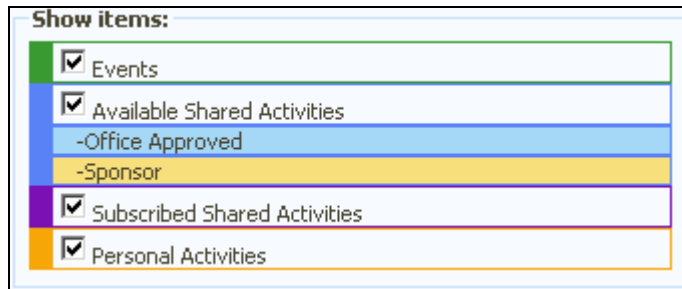
 **You have been logged out**

- ➔ Your CDP session will end automatically if you do not use the system for some time. The **LOGIN** page and a message -  **Your session has timed out. You must re-login.** will be displayed when you attempt to carry out an action.

3 Working with My Diary

3.1 Viewing the Diary

- Click **DIARY**
- The **MY DIARY (BY MONTH)** page is displayed
- The diary page shows all **Events** and **Activities** for the selected month
- The activities are colour-coded:



Note: The list on your screen may vary from that shown here due to changes made to customise the system for your specific requirements.

Events

An **Event** contains a number of **Activities**. The CPD administrator puts these onto the CPD system.

See section 5.1.5 on page 15 for information on adding the Event Activities to your diary.

Available Shared Activities

Office Approved
Sponsor

These are **Activities** (sometimes associated with an **Event**), which you *have not yet subscribed to*. The CPD administrator puts these onto the CPD system. They may be **Office Approved** (originating from your own Company/Organisation), or **Sponsor** (originating from an educational provider or associated company/organisation for example)

See section 5.1.5 on page 15 for information on adding the Activities to your diary.

Subscribed Activities

Shared

These are **Office Approved** or **Sponsor Shared Activities** which you *have subscribed to*.

See section 5.1.5 on page 15 for information on adding the Activities to your diary.

Personal Activities

These are your own **Personal Activities** related to CPD.

See section 4.1 on page 7 for information on adding Personal Activities to your diary.

3.2 Changing the Diary View

3.2.1 Viewing a different month

- Scroll to the bottom of the page and select the month, year and duration required from the drop-down options provided in the **Select Period** panel

Select Period:

Month:

Duration:

- Click

3.2.2 Changing to Week view

- Click
- The **MY DIARY (BY WEEK)** page is displayed
- In the week view the **name** of the **Activity** is displayed along with the name of the **Activity Organiser**
- Use the **Select Period** panel to view details of the **Previous** or **Next** week

Select Period:

- Or, click  to display a **Calendar** to choose a date from

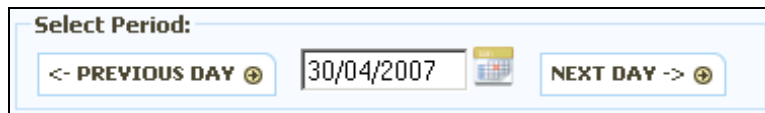
April, 2007								
Today								
wk	SUN	MON	TUE	WED	THU	FRI	SAT	
13	1	2	3	4	5	6	7	
14	8	9	10	11	12	13	14	
15	15	16	17	18	19	20	21	
16	22	23	24	25	26	27	28	
17	29	30						



Select date

- Click

3.2.3 Changing to Day view

- Click **DAY OVERVIEW**
- The **MY DIARY (BY DAY)** page is displayed
- In the day view the **name** of the **Activity** and the **Organiser** is displayed along with the **details** of the activity
- Use the **Select Period** panel to view details of the **Previous** or **Next** day

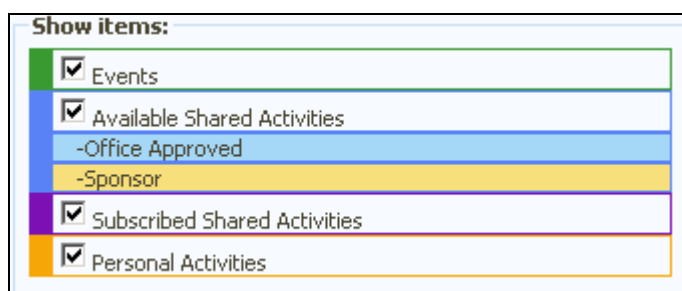


- Or, click  to display a **Calendar** to choose a date from
- Click **UPDATE** 

➔ In the **Month** view click on a **date** to go straight to the **Day** view for that day.

3.3 Showing and Hiding Events and Activities

- Tick the checkboxes next to items to show, and untick the checkboxes next to items to hide




Note: The list on your screen may vary from that shown here due to changes made to customise the system for your specific requirements.

- Click **UPDATE** 

4 Working with My Activities

4.1 Adding a Personal Activity

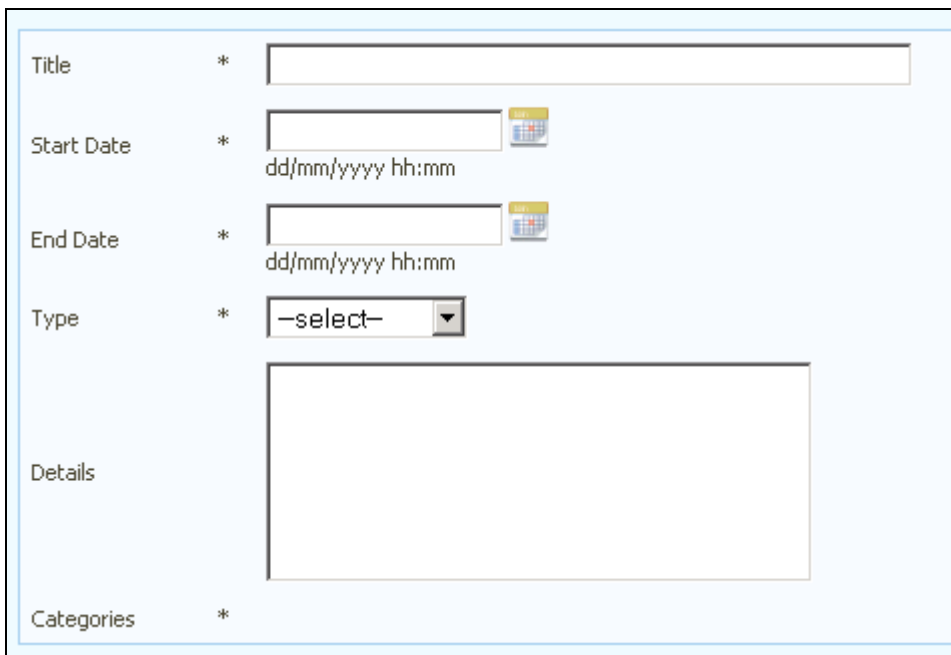
- Using the diary, display the **Month** in which the activity is to take place, and then click the  on the date the activity is to be added to



OR

- Click **MY ACTIVITIES** followed by **ADD NEW PERSONAL ACTIVITY** 

OR

- Hover over **MY ACTIVITIES** and choose **ADD PERSONAL ACTIVITY** from the menu
- The **EDIT PERSONAL ACTIVITY** page is displayed
- This page is used to enter details of a new activity or to edit the details of an existing one
- Enter **details** of the activity – the fields marked with an asterisk (*) are **required fields** and must be completed




Title	*	<input type="text"/>
Start Date	*	<input type="text"/>  dd/mm/yyyy hh:mm
End Date	*	<input type="text"/>  dd/mm/yyyy hh:mm
Type	*	<input type="text" value="-select-"/>
Details		<input type="text"/>
Categories	*	<input type="text"/>

Note: The fields on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

THEN EITHER

- Click **SAVE DETAILS** 



OR

- If your organisation uses a category structure click on the **SAVE AND LINK CATEGORIES**  button
- A list of **Categories** will be displayed

Categories for association

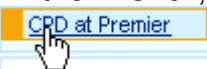


<input type="checkbox"/> Other [+]	<input type="checkbox"/> Courses	<input type="checkbox"/> Voluntary work	<input checked="" type="checkbox"/> Public service
<input type="checkbox"/> Self-directed learning [+]			
<input type="checkbox"/> Formal / educational [+]			
<input type="checkbox"/> Professional activity [+]			
<input type="checkbox"/> Work based learning [+]			

Note: The categories on your screen will vary from the example shown here and will be based on the needs of your organisation.

- Click  to **expand** and **collapse** the lists
- **Tick** the categories that the activity should be linked to
- Click **SAVE** 

4.2 Viewing/Editing details of a Personal Activity

4.2.1 Via the Diary

- Locate the activity in the **Month**, **Week** or **Day** view and click on the name of the activity 
 - The **EDIT PERSONAL ACTIVITY** page is displayed
 - If any changes are made, click **SAVE DETAILS**  to save the changes
- OR
- Where applicable, click **SAVE AND LINK CATEGORIES**  to add/remove linked categories (as explained on page 8)

4.2.2 Via the Activities List


- Access the list in one of the following ways

EITHER



- Click **MY ACTIVITIES** followed by  [View personal activities](#)

OR

- Hover over **MY ACTIVITIES** and choose **PERSONAL ACTIVITIES** from the menu
- The **MY PERSONAL ACTIVITIES** page is displayed

<u>Title</u>	<u>Start Date</u> 	<u>End Date</u>	<u>Categories</u>	<u>Review</u>	<u>Action(s)</u>
new cpd	10/02/2007 09:00	10/02/2007 09:00	Attending conferences // Distance learning // Learning by doing // Writing articles or papers	Added	<input type="checkbox"/> Delete
Observed laser eye surgery	03/03/2007 00:00	03/03/2007 00:00	Reading journals/articles // Reviewing books or articles	Added	<input type="checkbox"/> Delete
new cpd	06/03/2007 10:00	06/03/2007 12:00	Reading journals/articles // Secondments // Work shadowing	Added	<input type="checkbox"/> Delete
unstructured learning	14/03/2007 00:00	14/03/2007 00:00		Added	<input type="checkbox"/> Delete
meeting	23/03/2007 13:00	23/03/2007 14:44	Learning by doing // Organising journal clubs or other specialist group // Supervising research	Added	<input type="checkbox"/> Delete
researching theory	24/03/2007 00:00	26/03/2007 00:00	Being an expert witness // Being promoted // Branch meetings	Added	<input type="checkbox"/> Delete
training in giving examinations	30/03/2007 09:00	30/03/2007 17:00	Public service	None	<input type="checkbox"/> Delete

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Click on any heading which is underlined to sort the list by that column
- In the example above the  symbol shows that this list is sorted by **Start Date** with the oldest activities at the top
- Clicking on the heading will reverse the sort order so that the oldest activities will be at the bottom of the list
- The **Review** column indicates whether a review has been added or not – once the activity has been completed a review should be added – click on the name of the activity in this list to access the **EDIT PERSONAL ACTIVITY** page and complete the review
- Use the **Delete** checkboxes followed by **UPDATE**  to remove activities
- If the list is very long it will be displayed on more than one page – use the numbered links [1](#) | [2](#) to go to a particular page, or next [>>](#) /previous [<<](#) to move forwards/backwards
- In a long list, use the **FILTERS** panel to specify which activities you are interested in displaying

Note: The filters on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

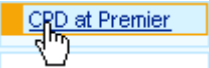

- Choose to view **Personal** or **Shared** activities using the **Type** drop-down list, use the **FILTER BY DATES** lists to view activities for a particular **month** and/or **year**, or enter dates **From** and **To**
- Once you have specified your criteria click [FILTER](#)
- Click [CLEAR](#) to remove your settings and view the entire list once again

4.3 Removing a Personal Activity






- Access the list in one of the following ways
EITHER
- Click [MY ACTIVITIES](#) followed by [View personal activities](#)
- OR
- Hover over [MY ACTIVITIES](#) and choose [PERSONAL ACTIVITIES](#) from the menu
- The **MY PERSONAL ACTIVITIES** page is displayed
- Tick the checkbox in the **Delete** column next to the activity to be removed
- Click [UPDATE](#)
- A message is displayed to confirm deletion

4.4 Reviewing a Personal Activity

4.4.1 Via the Diary





- Locate the activity in the **Month**, **Week** or **Day** view and click on the name of the activity 
- The **EDIT PERSONAL ACTIVITY** page is displayed
- Use the fields available in the **MY REVIEW** area to add information regarding how the activity went, what was learnt etc.
- Click  to save the changes

4.4.2 Via the Activities List

- Access the list in one of the following ways
EITHER
- Click  followed by 
- OR
- Hover over  and choose  from the menu
- The **MY PERSONAL ACTIVITIES** page is displayed
- Click on the name of the **Activity** to be reviewed
- The **EDIT PERSONAL ACTIVITY** page is displayed
- Use the fields available in the **MY REVIEW** area to add information regarding how the activity went, what was learnt etc.
- Click  to save the changes

4.5 Subscribed Shared Activities

4.5.1 Accessing the My Shared Activities page

- Hover over  and choose  from the menu
- OR
- Click  followed by 
- The **MY SHARED ACTIVITIES** page is displayed
- This only shows shared activities to which *you have subscribed*

4.5.2 Using the My Shared Activities list

- Use the list as described in section 4.2.2 on page 9

4.6 All My Activities

4.6.1 Accessing All My Activities

- Hover over **MY ACTIVITIES** and choose **ALL MY ACTIVITIES** from the menu
- OR
- Click **MY ACTIVITIES** followed by **View all activities**
 - The **ALL MY ACTIVITIES** page is displayed
 - This shows all personal and shared activities to which *you have subscribed*

4.6.2 Using the All My Activities list

- Use the list as described in section 4.2.2 on page 9

5 Working with Shared

5.1 Events

5.1.1 Accessing the Events list

- Hover over **SHARED** and choose **EVENTS** from the menu
- The **EVENTS** page is displayed
- This page lists the **Events** which have been organised by your organisation, a sponsor or a partner, and to which you may subscribe – this list is added to and maintained on the CPD system by the **System Administrator**

EVENTS					
Title	Start Date	End Date	Contact	Origin	Action(s)
HPC annual conference 2007	26/03/2007	26/03/2007	Rob Siveter	Office	view activities
Sponsors Practical training course	23/04/2007	09/05/2007	Roland Furber	Sponsor	view activities
Test 5	25/04/2007	25/04/2007	Roland Furber	Partner	view activities

UPDATE

FILTERS

FILTER BY ORIGIN:
Type:

FILTER BY DATES:
From: (dd/mm/yyyy)
To: (dd/mm/yyyy)

FILTER

CLEAR

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Sort the list and use the **FILTERS** panel as described in section 4.2.2 on page 9

5.1.2 Viewing the Event Details

- Click on the **Title** of the Event
- The **EVENT DETAILS** page is displayed


EVENT DETAILS

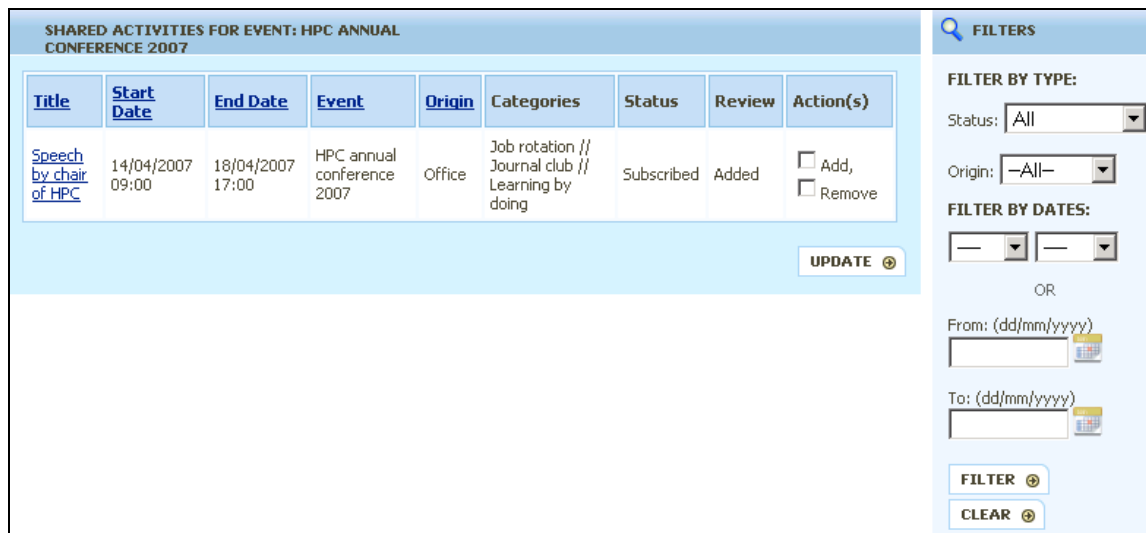
Title	HPC annual conference 2007
Start Date	2007-03-26
End Date	2007-03-26
Details	This is a one day event.
Resources	none
Url	http://www.hpc-uk.org
Origin	Office
Organiser	Andrew Brown
Contact	Rob Siveter p: 01455 123456 m: 07968 123456 e: rsiveter@premierit.com
Address	Premier IT New Premier House 120 Southampton Row London Greater London WC1B 5AL United Kingdom

LIST EVENT ACTIVITIES

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.



5.1.3 Accessing the Event Activities

- Click **LIST EVENT ACTIVITIES** 
- The **SHARED ACTIVITIES FOR EVENT: NAME OF EVENT** page is displayed
- This is a list of **Activities** which are part of the **Event**





The screenshot displays a web interface for managing event activities. The main area is titled "SHARED ACTIVITIES FOR EVENT: HPC ANNUAL CONFERENCE 2007". It contains a table with the following columns: Title, Start Date, End Date, Event, Origin, Categories, Status, Review, and Action(s). A single activity is listed: "Speech by chair of HPC" starting on 14/04/2007 at 09:00 and ending on 18/04/2007 at 17:00. The event is "HPC annual conference 2007", the origin is "Office", and categories include "Job rotation // Journal club // Learning by doing". The status is "Subscribed" and the review is "Added". In the Action(s) column, there are checkboxes for "Add" and "Remove". An "UPDATE" button with a help icon is located below the table.

On the right side, there is a "FILTERS" panel. It includes a search icon and the following options:

- FILTER BY TYPE:** Status: All (dropdown), Origin: -All- (dropdown)
- FILTER BY DATES:** From: (dd/mm/yyyy) [input field], To: (dd/mm/yyyy) [input field]
- Buttons: FILTER  and CLEAR 

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Sort the list and use the **FILTERS** panel as described in section 4.2.2 on page 9
 - The **Status** column shows if the activity has been **Subscribed** to (i.e. added to your diary) or is still **Available**
 - Use the **Add** checkbox in the **Action** column followed by **UPDATE**  to add an **Available** activity to your diary
 - Use the **Remove** checkbox in the **Action** column followed by **UPDATE**  to remove a **Subscribed** activity from your diary
 - The **Review** column shows if the review has been **Added** or not
- ➔ Clicking the **view activities** link on the **EVENTS** page will bring you straight into this list without showing the **Event Details** first.

5.1.4 Accessing the Activity Details


- Click on the **Title** of the Activity
- The details of the **SHARED ACTIVITY** are displayed

SHARED ACTIVITY

Title	Speech by chair of HPC
Start Date	Saturday 14th of April 2007 09:00:00
End Date	Wednesday 18th of April 2007 17:00:00
Type	---
Event	HPC annual conference 2007
Origin	Office
Organiser	
Contact	see event
Details	The British Paramedic Association will be sponsoring many courses, such as ATLS, ACLS, APLS and AMLS. That is Advanced (Trauma, Cardiac, Paediatric and Medical) Life Support. We will be providing online support for members who are undertaking these courses, with advice, explanation of questions raised by members, model answers to questions and general advice on how to achieve high standards on the courses and exams. We will also be sponsoring short study days and weekends, on subjects as diverse as paediatrics, geriatrics, RTA management, wound care, aviation and diving medicine, and will need to advertise them here.
Address	see event
Categories	Job rotation, Journal club, Learning by doing
Resources	HPC website , Useful information for trainees


Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- The information panel at the right of the screen tells you if you have subscribed to the activity or not, and also provides a button to remove the activity.



 **ACTIVITY SUBSCRIBED**

This activity is subscribed to your diary.

NB: You may only review activities after they have ended

REMOVE ACTIVITY 

5.1.5 Adding a Shared Activity

- Click **LIST EVENT ACTIVITIES** 
- The **SHARED ACTIVITIES FOR EVENT: NAME OF EVENT** page is displayed
- Use the **Add** checkbox in the **Action** column followed by **UPDATE**  to add an **Available** activity to your diary

5.1.6 Reviewing the Activity

→ You can only review an activity once it has ended.

- Scroll down the **SHARED ACTIVITY** page to display the **MY REVIEW** section
- Enter **details** as required – the fields marked with an asterisk (*) are **required fields** and must be completed

The screenshot shows a form titled "MY REVIEW" with the following fields:

- Review ***: A text area containing the text: "The speaker focused on areas which were very topical and of great interest to me. The information gained will benefit my understanding of this topic greatly. I took some notes and received some reference materials to take away with me."
- Hours ***: A dropdown menu with the value "2.5" selected.
- Experience Gained ***: A text area containing the text: "new skills learnt, up-to-date information received"
- Improved patient care**: A text area containing the text: "will allow me to use the new systems and procedures more effectively thus benefitting the patients."
- Supporting Resources ***: A list box containing three items: "a reference resource", "copy of letter", and "documentation of work shadowing". The "documentation of work shadowing" item is currently selected.

At the bottom of the form is a button labeled "SAVE REVIEW" with a plus icon.

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Click **SAVE REVIEW** +
- A confirmation message will appear **✔ The review has been saved**


5.2 Available Shared Activities

5.2.1 Accessing the Shared Activities list

- Hover over **SHARED** and choose **AVAILABLE SHARED ACTIVITIES** from the menu
- The **SHARED ACTIVITIES** page is displayed
- This only shows activities to which you *have not* yet subscribed

➔ Clicking on **SHARED** will bring you straight to the **SHARED ACTIVITIES** list.

5.2.2 Using the Shared Activities list



- Sort the list and use the **FILTERS** panel as described in section 4.2.2 on page 9
- View details of an activity by clicking on its **Title**
- Use the **Add** checkbox in the **Action** column followed by **UPDATE**  to add an **Available** activity to your diary

5.3 All Shared Activities

5.3.1 Accessing the All Shared Activities list

- Hover over **SHARED** and choose **ALL SHARED ACTIVITIES** from the menu
- The **SHARED ACTIVITIES** page is displayed
- This shows all activities – those which are *available* and those to which *you have subscribed*

5.3.2 Using the Shared Activities list

- Sort the list and use the **FILTERS** panel as described in section 4.2.2 on page 9
- View details of an activity by clicking on its **Title**
- Use the **Add** checkbox in the **Action** column followed by **UPDATE**  to add an **Available** activity to your diary
- Use the **Remove** checkbox in the **Action** column followed by **UPDATE**  to remove a **Subscribed** activity from your diary
- The **Review** column shows if the review has been **Added** or not

6 Resources

Resources are typically documents and websites which are used to supplement and support training or to provide evidence of completion e.g. course certificates.

6.1 Personal Resources

6.1.1 Accessing Personal Resources


- Hover over **RESOURCES** and choose **PERSONAL RESOURCES** from the menu
- The **PERSONAL RESOURCES** list will be displayed
- This shows resources that you have added to the system yourself

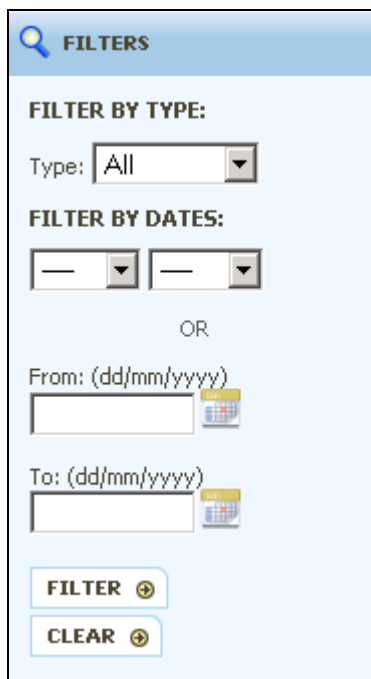
PERSONAL RESOURCES				
Title	Date Added	Type	Categories	Action(s)
documentation of work shadowing	22/01/2007	file	Keeping a file of your progress // Reading journals/articles // Reviewing books or articles	View <input type="checkbox"/> Delete
copy of letter	31/01/2007	file	Clinical audit // Coaching from others // Discussions with colleagues	View <input type="checkbox"/> Delete
a reference resource	01/02/2007	reference	Public service	View <input type="checkbox"/> Delete
ECP article	04/04/2007	file		View <input type="checkbox"/> Delete
Articles for EMJ	04/04/2007	file	Involvement in a professional body	View <input type="checkbox"/> Delete
Picture	06/04/2007	file	Attending conferences // Formal / educational	View <input type="checkbox"/> Delete
Image	13/04/2007	file		View <input type="checkbox"/> Delete
Summary of workforce article	02/05/2007	file	Writing articles or papers	View <input type="checkbox"/> Delete

UPDATE 



Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

6.1.2 Using the Personal Resources list

- Click on any **heading** which is underlined to **sort** the list by that column
- Click on the heading again to reverse the sort order
- The **Type** column indicates whether the resource is a **file** or a **reference** e.g. a web site address
- The **View** link in the **Action(s)** column will open the **file** (if the resource is a file), or will display details of the **reference**
- Use the **Delete** checkboxes in the **Action(s)** column followed by **UPDATE**  to remove resources
- If the list is very long it will be displayed on more than one page – use the numbered links [1](#) | [2](#) to go to a particular page, or next [>>](#)/previous [<<](#) to move forwards/backwards
- In a long list, use the **FILTERS** panel to specify which resources you are interested in displaying



Note: The filters on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Choose to view **File**, **URL** or **Reference** resources using the **Type** drop-down list, use the **FILTER BY DATES** lists to view resources added within a particular **month** and/or **year**, or enter dates **From** and **To**
- Once you have specified your criteria click **FILTER**  or click **CLEAR**  to remove your settings and view the entire list once again

6.2 Add a Personal Resource

- Hover over **RESOURCES** and choose **ADD A PERSONAL RESOURCE** from the menu
- The **ADD A RESOURCE** page will be displayed
- This page is used to enter details of new resources

The screenshot shows a web form titled "ADD A RESOURCE". Below the title is a sub-section "RESOURCE DETAILS". The form includes the following fields and controls:

- Title**: A text input field with an asterisk (*) indicating it is a required field.
- Description**: A larger text area for entering details.
- Type**: A dropdown menu with an asterisk (*) indicating it is a required field. The current selection is "-select-".
- File Upload**: A text input field next to a "Browse..." button.
- Categories**: A text input field with an asterisk (*) indicating it is a required field.
- SAVE AND LINK CATEGORIES**: A button with a plus icon (+) located at the bottom of the form.

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- This page is used to enter details of a new resource or to edit the details of an existing one
- Enter **details** of the resource – the fields marked with an asterisk (*) are **required fields** and must be completed

THEN EITHER

- Click **SAVE DETAILS** (+)

OR

- If your organisation uses a category structure click on the **SAVE AND LINK CATEGORIES** (+) button
- A list of **Categories** will be displayed

Categories for association

Other [\[+\]](#)

Courses Voluntary work Public service


Self-directed learning [\[+\]](#)

Formal / educational [\[+\]](#)

Professional activity [\[+\]](#)

Work based learning [\[+\]](#)

Note: The categories on your screen will vary from the example shown here and will be based on the needs of your organisation.

- Click [\[+\]](#) to **expand** and **collapse** the lists
- **Tick** the categories that the resource should be linked to
- Click [SAVE](#) 

6.3 Shared Resources

- Hover over [RESOURCES](#) and choose [SHARED RESOURCES](#) from the menu
- The **SHARED RESOURCES** page will be displayed
- This page lists the resources added to the CPD system by the **System Administrator** and available for your use

SHARED RESOURCES				
Title	Date Added	Type	Categories	Action(s)
Useful information for trainees	13/11/2006	file	Voluntary work	View
a shared resource	15/11/2006	file	Going to seminars // Planning or running a course // Research	View
HPC website	16/11/2006	url	Keeping a file of your progress	View
Educational website	07/03/2007	url	Journal club	View
a new reference	07/03/2007	reference	Reading journals/articles	View
NHS Career Framework	22/04/2007	file	Other	View
Picture of injury	25/04/2007	file		View
BPA Website	25/04/2007	url	Professional activity	View

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Use the list as described in section 6.1.2 on page 19
- ➔ Click [RESOURCES](#) to go straight to the **SHARED RESOURCES** list.

6.4 Propose Shared Resource

- Hover over **RESOURCES** and choose **PROPOSE SHARED RESOURCE** from the menu
- The **PROPOSE A SHARED RESOURCE** page will be displayed
- This page is used to enter details of new resources

The screenshot shows a web form titled "PROPOSE A SHARED RESOURCE". The form is divided into a header section and a main content area. The header section contains the title "PROPOSE A SHARED RESOURCE". Below the header is a tab labeled "RESOURCE DETAILS". The main content area contains several input fields: "Title" with an asterisk, "Description", "Type" with an asterisk and a dropdown menu showing "-select-", "File Upload" with a "Browse..." button, and "URL". At the bottom of the form is a button labeled "SAVE AND LINK CATEGORIES" with a plus icon.

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- Continue as described in section 6.2 on page 20
- These **Proposed Shared Resources** will only appear in the **Shared Resources** list once they have been **approved** by the **System Administrator**

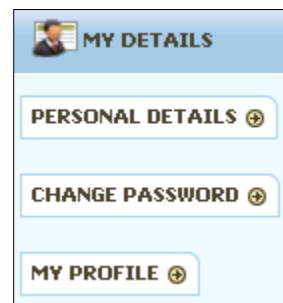
7 Reports

The Reports available to view within the CPD system will vary depending on the requirements of your Company/Organisation.

- Point to **REPORTS** and choose a report name from the menu for example **CATEGORIES SUMMARY**
- This list can be sorted and navigated as described in section 6.1.2 on page 19
- Use the **view activities** link to see a list of all **Activities** linked to that **Category**

8 My Details

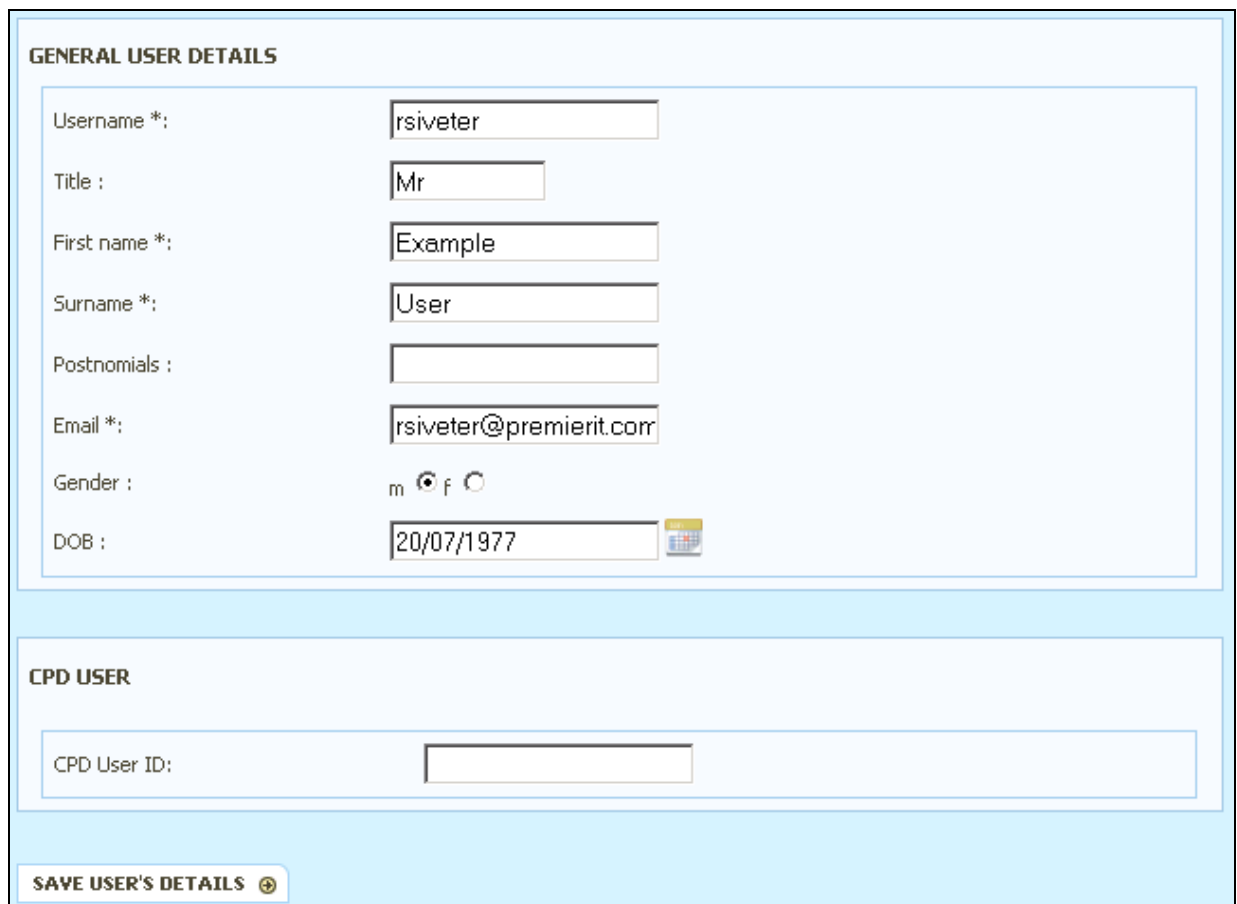
- Click on **MY DETAILS** to access these options:



8.1 Personal Details

8.1.1 General User Details

- Click on **PERSONAL DETAILS**
- The **EDIT USER** page is displayed
- This page is used to edit information about the user

A screenshot of a web form titled 'GENERAL USER DETAILS'. The form is divided into two main sections. The top section contains several input fields: 'Username *' (value: rsiveter), 'Title' (value: Mr), 'First name *' (value: Example), 'Surname *' (value: User), 'Postnominals' (empty), 'Email *' (value: rsiveter@premierit.com), 'Gender' (radio buttons for 'm' and 'f', with 'm' selected), and 'DOB' (value: 20/07/1977, with a calendar icon). The bottom section is titled 'CPD USER' and contains a 'CPD User ID' field. At the bottom of the form is a button labeled 'SAVE USER'S DETAILS'.

Note: The headings and options on your screen may vary from those shown here due to changes made to customise the system for your specific requirements.

- The fields marked with an asterisk (*) are **required fields** and must be completed
- Click **SAVE USER'S DETAILS**

8.1.2 Addresses

- Scroll down the screen to display the following:

CURRENT ADDRESS DETAILS

Street Address	Premier IT ,New Premier House ,120 Southampton Row
Town	London
Region	Greater London
Postcode	WC1B 5AL
Country Code	United Kingdom

UNASSIGN PUBLIC ADDRESS Ⓡ

MAKE PRIMARY Ⓡ

ADD ADDRESS Ⓡ

- The user may add an address **ADD ADDRESS** Ⓡ to use as a Primary Address **MAKE PRIMARY** Ⓡ (for contact purposes), or may use a Public Address (which will have been added by the System Administrator)

8.2 Change Password

- Click on **CHANGE PASSWORD** Ⓡ
- The **CHANGE YOUR PASSWORD** page is displayed
- Change your password as described in section 2.3 on page 2

8.3 My Profile

- Click on **MY PROFILE** Ⓡ
- The **PERSONAL PROFILE** page is displayed
- A list of **CPD Standards** may be listed (The content of this will vary depending on the requirements of your Company/Organisation)

1. Maintain a continuous, up-to-date and accurate record of CPD activities
2. Demonstrate your CPD activities are a mixture of learning activities relevant to current or future practice
3. Seek to ensure that your CPD has contributed to the quality of practice and service delivery
4. Seek to ensure that your CPD benefits the service users
5. Present a written profile containing evidence of CPD

- Various fields are available in the **Personal Profile** area – use these to enter as much information as possible about your CPD experiences
- Click on **SAVE AUDIT** Ⓡ