PREMIER IT PARTNERSHIP
CONTINUING PROFESSIONAL DEVELOPMENT

CPD User Manual

Table of Contents

1. Introduction

1.1. Introduction to Online CPD

The following on-line system has been created to record your Continuing Professional Development (CPD) activities. Participants can view details of organised events and decide which associated activities they want to 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 by you on-line and report. This category of person are called CPD System Administrators.

1.2. CPD Monitoring

This system allows for the allocation of points or hours for completed activities, 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.

1.3. Downloading the CPD Policy Document

If 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.

1.4. Common Functionality

1.4.1. Mandatory Fields

Fields marked with a * are mandatory, and therefore must be completed in order that the page be saved.

1.4.2. Hints and Tips

Throughout the site there are Hints and Tips available on the right hand side of the page.

2. Logging in and out

2.1. Logging In

To gain access to the Continuing Professional Development (CPD) you will need your supplied username and password. Contact your system administrator if you do not have these details.

In this manual the Premier IT website is used as the example

Open a web browser (e.g. Internet Explorer or Firefox) and then type the website address in the address field. For example, http://www.premierit.com. This will display the front end of the website.

The Login page will be displayed

- Select the **Username** field and enter your username.
- Select the **Password** field and enter your password – *this is case sensitive*.
- Click the **Login** button.

  The **CPD Homepage** will be displayed. We will look at this in Section **3.**

2.2. Forgotten Password

If you have forgotten either your username or password you can click on the '**Forgot your login details**' link and follow the prompts.

- Enter either your Username or Email Address and click the **Send** button.
  For security reasons, you will not see a confirmation message, informing you whether or not the system has recognised your email address or username, when you click send.

An email will be sent to the specified email address or to the email address held on the system for that Username. This will include a link that allows you to recover your username or reset your password. Please allow time for the email to arrive.

2.3. Logging out

For security reasons it is important that you log out when you have finished using the CPD.

- When logged in, on each screen you will see your name displayed, alongside a link with the text Logout.

Note: Your CDP session will end automatically if you do not use the system for 60 minutes.

2.4. Changing your Password

For security reasons, we recommend that you change your password after entering the online 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. It is suggested that you use a password that has both letters and numbers.

Make sure your password is something that is memorable to you

To change your password:

- Click **My Details** at the top-right of the page.
- Click **Login Details.**
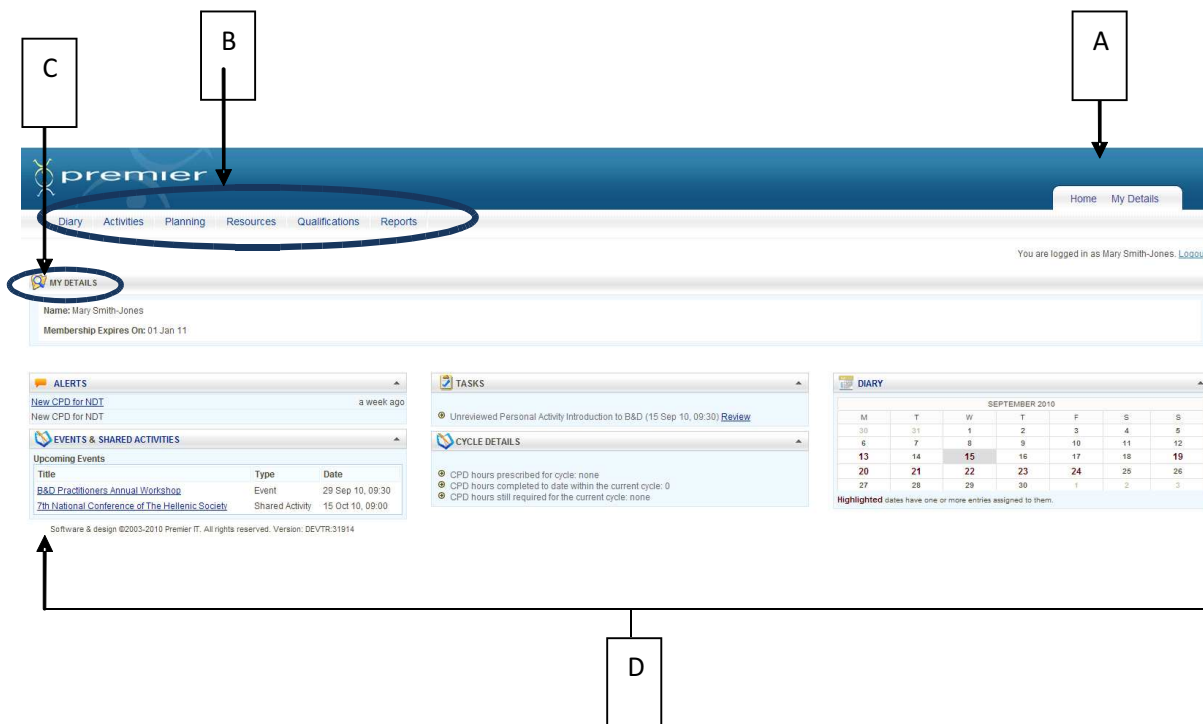- The **Change Your Login Details** page is displayed.

- Enter your **Current Password**.
- Enter your **New Password**.
- Confirm your new password by entering it a second time in the final field.
- Click **Save.**
- A **confirmation message** will be displayed.

- When your password has been changed you will be redirected to the my details page where the following message will be displayed:

-

3. The Homepage

The home page allows you quick access to the various areas on interest whilst also alerting you to any outstanding tasks or messages.

The Home Page has a number of interfaces as shown below:

| A	Contains two tabs :
	1. **Home:** Returns you to the Home Page.
	2. **My Details:** Displays all your Registration Details.
B	Contains six tabs :
	1. **Diary:** Shows Events and Activities.
	2. **Activities:** Administers activities.
	3. **Planning:** Administers plans.
	4. **Resources:** Administers resources.
	5. **Qualifications:** Administers qualifications.
	6. Reports: The Reports available to view within the CPD system will vary depending on the requirements of the Company/Organisation.
C	**My Details** - Your Login name and Membership Expiry date
D	These are the Homepage Portlets:
	1. **Alerts:** Text-based alerts can be added which will be shown on the homepage of all users.
	2. **Events & Shared Activities:** Displays upcoming Events and Shared Acitivities.
	3. **Tasks:** Displays items, such as unreviewed activities, which require an action.
	4. **Cycle Details:** The CPD system can optionally denote Periods ("cycles") for a user. This means a diary is made up of fixed periods of months or years which are compartmentalised from each other. The user is able to view any of the periods of their diary, but once a period has completed a user cannot edit or add activities within it.
	5. **Diary:** Shows Events and Activities.

The home page may be customised by clicking on an item and dragging it to another part of the screen as shown below:
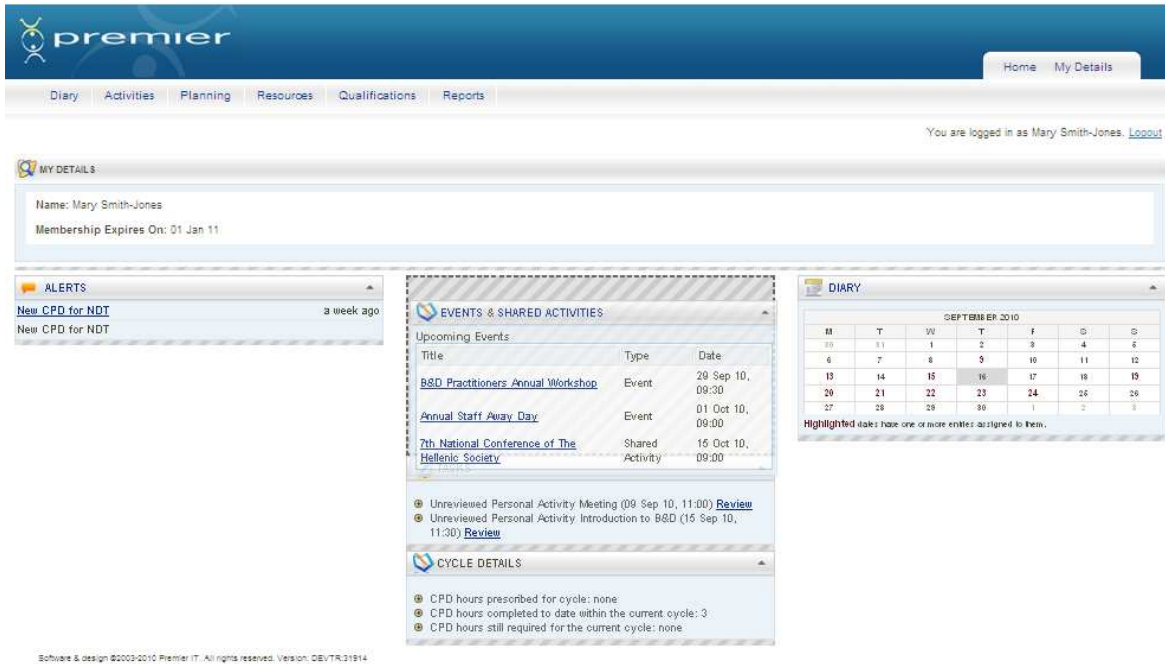
4. The Diary

The Diary displays all events and activities which are available to you.

- To view the diary click on the **Diary** tab.
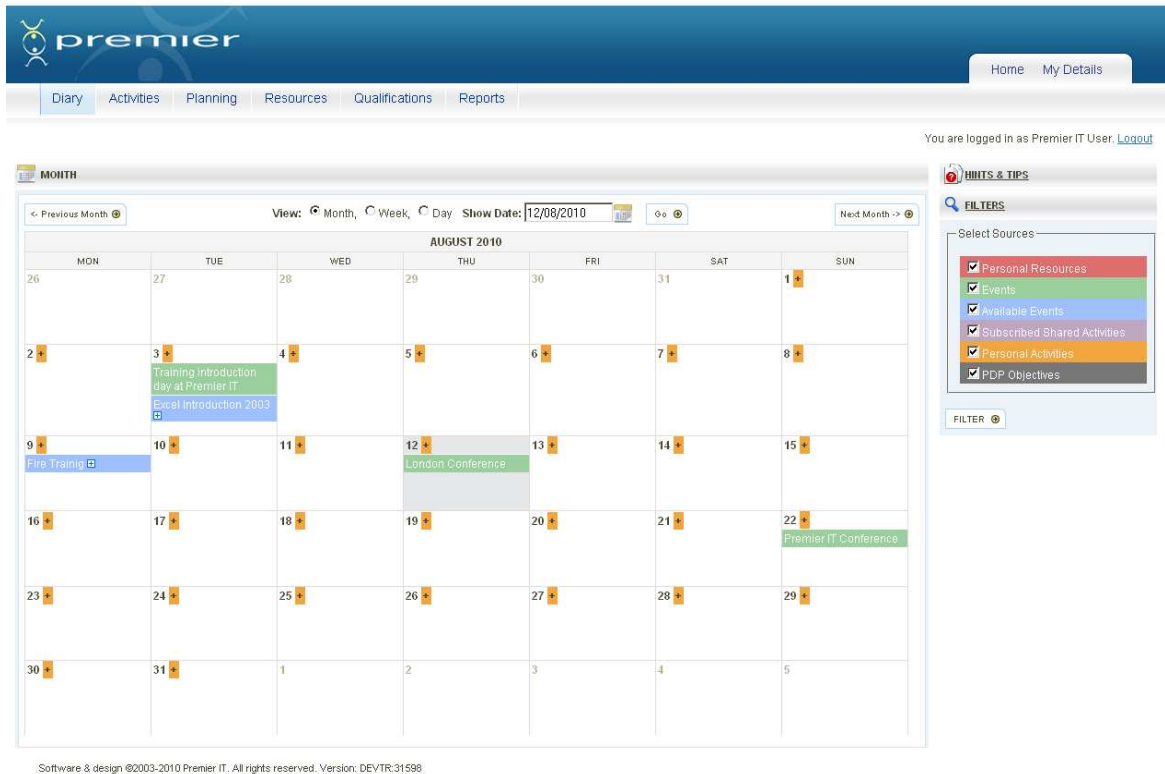
- The default view will be the current month.

4.1. Changing view within the Diary

Running along the top of the diary page is a filter area, which allows you to move from monthly view to week view and day view. This area also allows you to move directly to a different date within the diary, or navigate from page to page in the diary.
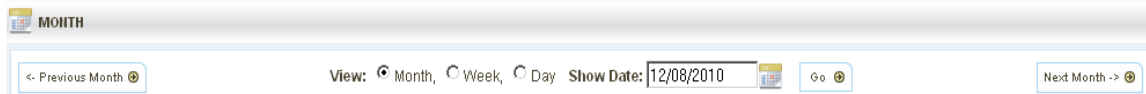
4.1.1. Viewing a different page within the Diary

- In **Month** view, use the **Previous Month** and **Next Month** on either side of the page to move from month to month.
- In **Week** view, use the **Previous Week** and **Next Week** on either side of the page to move from month to month.
- In **Day** view, use the **Previous Day** and **Next Day** on either side of the page to move from month to month.

4.1.2. Switching view type

To switch views, click in the appropriate radio buttons:
- For Week view, click in the radio button next to **Week.**
- For Day view, click in the radio button next to **Day.**
- Click the **Go** Button.

4.1.3. Viewing a specific date

- Use the **Date field** or **Calendar button** to navigate directly to a different date in the diary.
- Type the date into the **Show Date:** box, using the format dd/mm/yyyy (e.g. 01/08/2010).

Or
- Click on the **Calendar Button**, use the drop down boxes to select the Month and Year you are after, or use the arrows to skip forwards or backwards by one month. Click on the date you would like to view.
- Click **Go**.

4.2. Filters in the Diary

In the diary, entries are coloured so that they are easily distinguishable. On the right hand side of the diary page you will see a Filters section, as show below:
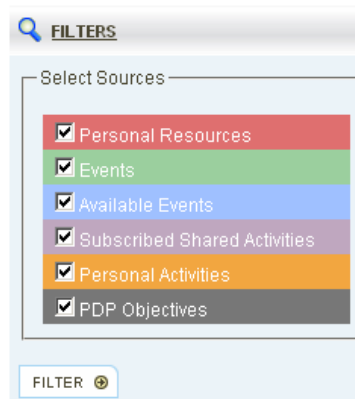
The filters also act as a key, so you can see what each of the colours represent.
1. **Personal Resources** – Any personal resources added by you (see section 7.1) will appear in the diary on the date they were added.

2. **Events** – These are added by the Administrator. In effect, Events are a way of grouping Shared Activities. Events cannot be subscribed to, but any Activities contained with in the event may be subscribed to.
3. **Available Events** – Also known as Available Shared Activities, are Shared Activities that have been added by an Administrator, which you have not subscribed to.
4. **Subscribed Shared Activities** – Shared Activities that have been added by an Administrator, which you have subscribed to.
5. **Personal Activities** – Any activities added by yourself (see section 5.1).
6. **PDP Objectives** – PDP Objectives will appear for two reasons: if a target review date has been set, and if a target completion date has been set, during the creation of the Objective (see section 6.4). The PDP Objective will appear in the diary on each of these dates, with either "Review" or "Completion" in brackets after the Objective.

5. Activities and Events

Activities are a combination of Personal Activities the user enters, and Shared Activities which an administrator can add, and all users can subscribe to.

Both activities require the user to provide their own unique review of the Activity, assessing their performance and reflecting on the experience and learning gained.

5.1. Adding a Personal Activity

Personal Activities are added by yourself and are personal to you.
It is possible to add Personal Activities either retrospectively, or before they have taken place.
An activity may span a number of days. For example, you may undertake an activity (e.g. Conference) which takes more than one day.
Once a Period/Cycle has been completed and closed, you cannot edit any of the activities within that Period/Cycle.

To add a personal activity:
- Hover over or click on the **Activities** menu.
- Click on **Add Personal Activities.**
- The **Add Personal Activity** screen is displayed.

- Enter a **Title** for your acitivity.
- Enter the **Start and End date** for your acitivity.
- Select an **Activity Type** from the drop down list.
- Enter any further **Details** about your activity if appropriate.
- If you are entering this activity retrospectively you may wish to add the **Activity Review** at this point. We will look at reviewing in section 5.5
- Once all details have been entered, click **Save Details** or **Save and link categories.**

- If you have clicked **Save and Link Categories**, the **Categories for Association** will be displayed.
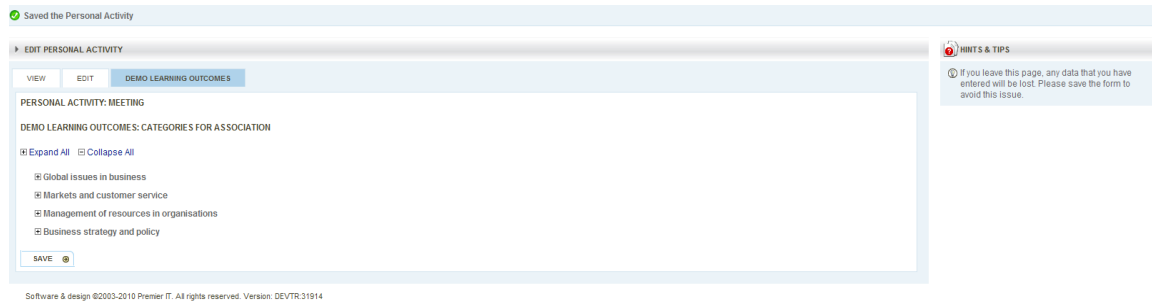
- **Expand** the list by clicking **Expand All** or the + symbols.
- Click in the tick box beside any category you wish to associate with your activity.
- Click **Save** when finished to save these details.
- You will be returned to the **List Personal and Subscribed Activities** page (see section 5.3)

5.2. Subscribing and unsubscribing to Shared Activities

There are 2 methods for subscribing to a Shared Activity.

1. The first method is to access the diary (see section 4).
   - Once in the diary, you will see a small plus sign beside any available activities.

   - When you click on this **Plus Sign**, you will automatically be subscribed to the activity.
   - The Activity will change colour, and you will now see a minus sign in place of the plus sign.

   - If you wish to unsubscribe from this activity at anytime, click on this **Minus Sign**.
   - You are taken to a **Confirmation Screen**.

- Click in the box beside the text "**Please check to confirm this action**".
- Click **Perform Action** to unsubscribe.

2. The second method is to access the Activity itself. You can do this from the Diary (see section 4) or from the List of Available Shared Activities (see section 5.6.2). If an activity is linked to an event, you can also do this by accessing the event details from Available Events (see section 5.6.1). When you have found the activity, click on the title to access the details of that activity.
     - Once in the **Shared Activity** screen, you will see a section on the right hand side titled **Available**.
     - Within this section is a **Subscribe** button.

- Click on **Subscribe**, and you will be automatically subscribed to the activity.
- The Available section will change to **Subscribed**, and the Subscribe button will change to **Unsubscribe**.

- If you wish to unsubscribe from this activity at any time, click on this **Unsubscribe** button.
- You are taken to a **Confirmation Screen**.

- Click in the box beside the text "**Please check to confirm this action**".
- Click **Perform Action** to unsubscribe.

5.3. Viewing Personal and Subscribed Activities

Personal Activities may be viewed by accessing the List of Personal and Subscribed Activities. To access this list:

- Hover over or click on the **Activities** menu.
- Click on **List Personal & Subscribed Activities.**
- The **Personal and Subscribed Activities and Events** screen is displayed.

- Click on any heading which is underlined to sort the list by that column.
- The Review column indicates whether a review has been added or not (see section 5.5 for reviewing).

5.4. Editing and Deleting Personal Activities

- To delete a Personal Activity, click in the box beside **Delete**, under actions, then click **Update.**
- If the list is very long it will be displayed on more than one page – use the numbered links to go to a particular page, or **Next** / **Previous** to move forwards/backwards.
- You can also use the **Filters** panel to filter by **Date** or **Cycle**. Select your criteria and click **Filter** to apply filters.

5.4.1. Duplicating Personal Activities

It is also possible to duplicate Personal Activities.

- Click on the **Duplicate** link under actions.
- The **Edit Personal Activity** screen is displayed

- Information entered in the original activity is displayed.
- Make any changes to the activity details as appropriate.
- Once all details have been entered, click **Save Details** or **Save and link categories.**
- If you have clicked **Save and Link Catergories**, the **Categories for Association** will be displayed.

- **Expand** the list by clicking **Expand All** or the **+** symbols.
- Click in the tick box beside any category you wish to associate with your activity.
- Click **Save** when finished to save these details.

To view the personal activity, click on the white **View** hyperlink and the following screen will be displayed:


Clicking on the activity from the **List of Personal Subscribed Activities** from the Activities tab will also take you to the above screen where you can **Duplicate**, **View** or **Edit**.

5.5. Reviewing an Activity

You are normally required to reflect and review all activities that you have added to your diary, both personal and shared – this is your CPD record.

The unreviewed activity can be accessed in one of the following ways:

- From the **Diary** – click on the name of the activity.
- From the **Activities** tab click on the **List Personal & Subscribed Activities.**
- From the **Activities** tab click on the **UnReviewed Activities**.
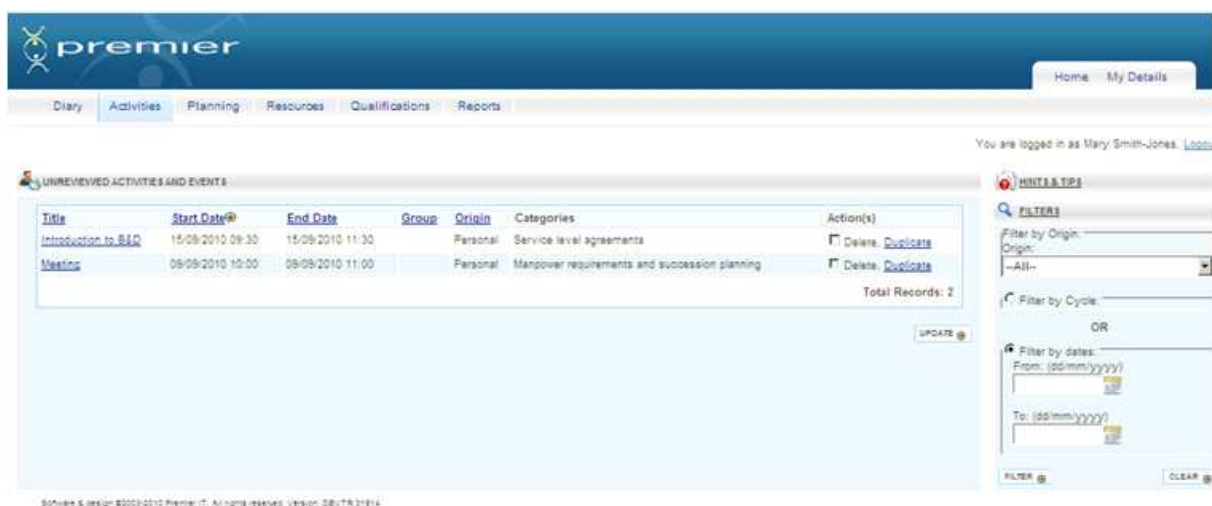
Note: You can only review an activity once it has ended

- Click on the **Activity hyperlink.**
- Select the **Edit** tab.
- Click on the **Add Activity Review** check box.
- The **Edit Personal Activity** screen expands to display extra fields.
- Enter the details as required and click on **Save Details** or **Save and Link Categories** as required.
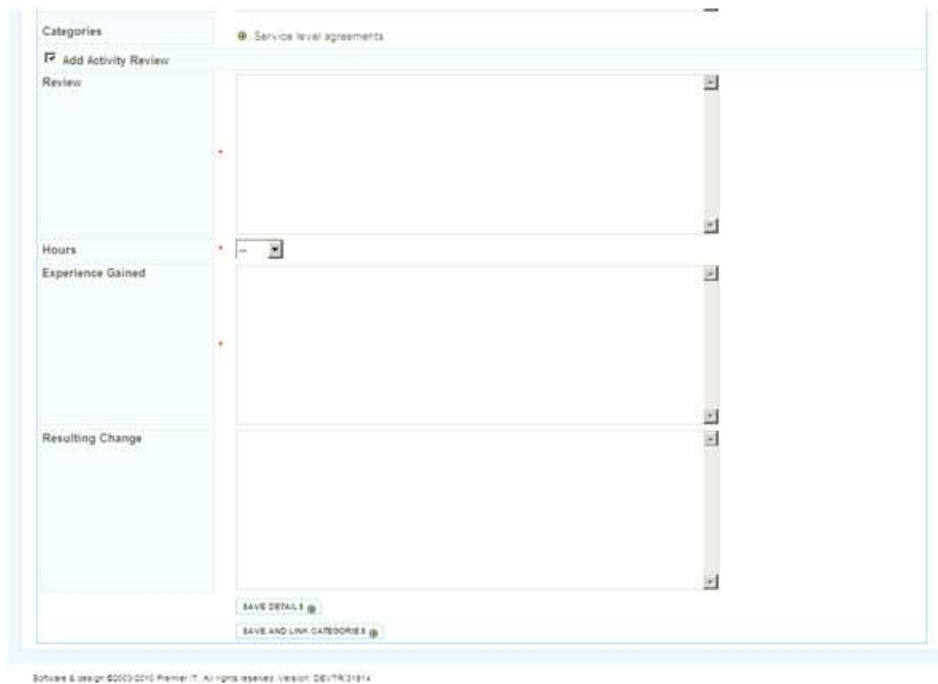
5.6. Other Activities Lists

To access any of these lists, hover over or click on the **Activities** menu. You will see these options in the menu. Click on any list you want to view.

5.6.1. Available Events

This list will show you all past and future events which have been added by administrators to the system. If removed by the administrators, events will no longer appear on this list.

5.6.2. Available Shared Activities

In this list you will see any future activities to which you have not yet subscribed. Should you wish to subscribe to an activity, click on the title of that activity, and then click on the subscribe button on the right hand side.

5.6.3. Planned Activities

Planned activities are all future shared activities to which you have subscribed and all future personal activities.

5.6.4. Unreviewed Activities

This list will show you any activities, personal or subscribed shared activities, which you have not yet added a review for. See section 5.5 for reviewing acitivities.

5.6.5. Reviewed Activities

Here you can see all reviewed activities.

5.6.6. Past Unsubscribed Activities

Any past shared activities to which you have not subscribed will be displayed in this list. From here you may be able to subscribe to activities. However, it is possible that administrators may have set certain activities to have a subscribe end date, meaning that you will be unable to subscribe to them after that date has passed.

5.7. Adding a Special Circumstance

You can, if you wish, request a time extension as a result of an extended absence due to special circumstances. If approved, this extends your current CPD cycle. Requests for time extensions must be approved by an administrator. Once approved they cannot be changed.

To add special circumstances:
- Hover over, or click on the **Activities** menu.
- Click on **Special Circumstances.**
- Click on **Add Special Circumstance**
- The **Add Special Circumstance** screen is displayed.

- Select a **Special Circumstance Type** from the drop down box.
- Enter a **Start Date**, using either the calendar button, or by entering the date into the box following the format dd/mm/yyyy.
- Enter an **End Date**, using either the calendar button, or by entering the date into the box following the format dd/mm/yyyy.
- **Comment** is for any further information that you wish to give.
- If your request is for a time extenstion, click in the box beside **Request time extension**.
- Click **Save Special Circumstance**.

6. Personal Development Plans

6.1. Viewing Personal Development Plans

- Hover over or click on the **Planning** menu.
- Click on **List Plans**.
- The **PDP Plans** screen is displayed.

In this screen you can re-order your plans using any of the headings a long the top.
- To re-order the list, click on **Description, Start Date, End Date** or **Status**.
- In the example above the list is ordered by Status. The arrow beside the text shows this.

6.2. Creating a Personal Development Plan

- Hover over or click on the **Planning** menu.
- Click on **Create New Plan**.
- The **Create New Plan** screen is displayed.

- Enter a description of the plan in the **Description** box.
- Enter a **Start Date**, using either the calendar button, or by entering the date into the box following the format dd/mm/yyyy.
- Enter an **End Date**, using either the calendar button, or by entering the date into the box following the format dd/mm/yyyy.
- Click the **Save** button.

6.3.   Viewing or Editing a Personal Development Plan

- Hover over or click on the **Planning** menu.
- Click on **List Plans**.
- Click on the title of the PDP you wish to view or edit.
- The **PDP Plan** screen is displayed.

- To make changes to the details of this PDP click **Edit**.

6.4.   Adding Objectives to a Personal Development Plan

- Hover over or click on the **Planning** menu.
- Click on **List Plans**.
- Click on the title of the PDP you wish to view or edit.
- The **PDP Plan** screen is displayed.
- Click on **Add Objective**.
- The **Add Objective** screen is displayed.

Description:	My Personal Development Plan		
Date Range:	01/08/2010 - 31/07/2011	Date Created:	12/08/2010 15:42

ADD PDP OBJECTIVE

Target Review Date		(dd/mm/yyyy)
Target Completion Date		(dd/mm/yyyy)
Objective *		
Action *		
Resources Required		
Measurement		

SAVE ⊕

A plan will have at least one objective which you will be working towards.

Make sure your objectives are SMART.

⊕ Specific
⊕ Measurable
⊕ Achievable
⊕ Realistic
⊕ Time related

- Fill in the details on this form as required. All boxes with an asterisk (*) beside them are required and must be completed.
- When you have completed the boxes, click **Save**.

- To add further objectives, repeat this process.

7. Resources

Resources are typically documents and websites which are used to supplement and support any activities that are to be added to the system.

You are able to add shared resources (these need to be approved by an administrator before becoming a resource that's available to the other users of the system).

7.1. Adding a Resource

- Hover over or click on the **Resources** menu.
- Click on **Add a Resource.**
- The **Add a Resource** screen is displayed.

- Select who will be able to view the resource from the drop down box beside **Resource is viewable by**.
  - ○ Selecting **Personal** will make this a resource viewable only by you.
  - ○ A **Public** resource requires approval from the Administrator. Once approved, this will be available as a shared resource to all users.
- Use the **Title** box to enter a title for your resource.
- Select a **Type** from the drop down box.
  There are 3 Resource types:
  1. **File**: A supporting file can be a document, picture or certificate etc.
  2. **Reference**: This is an item that cannot be linked to, such as a publication or ISBN number. References do not require any additional info (it should all be stored in the Description field).
  3. **URL**: This is a link to another website. The URL should start with http:// or https://.
  When you have chosen a Type, you will need to insert the appropriate information depending on the type you have selected.
- If necessary, enter a Description. This is not a required field so this can be used as appropriate.
- Click **Save Details** to save your new resource.

7.2. Viewing Resources
There are three different lists for viewing resources.

7.2.1. List Personal Resources
To view your personal resources you will need to access the list of personal resources. To do this:
- Hover over or click on the **Resources** menu.
- Click on **List Personal Resources.**
- The **List Personal Resources** is displayed.

- From here you can edit resources by clicking on the **Edit** link under actions.
- You can also delete resources from here. Click in the box beside **Delete**, under Actions, then click **Update.**

7.2.2. List Shared Resources

The list of shared resources displays any resources you have added, which you have marked as public, and that have been approved. This list also shows resources which have been added by administrators, or approved public resources added by other users. To view this list:
- Hover over or click on the **Resources** menu.
- Click on **List Shared Resources.**
- The **Shared Resources** is displayed.

- From here you can view resources by clicking on the **View** link under Actions.
- Shared resources cannot be edited.

7.2.3. List Proposed Resources

This list will display any public resources added by you, which are still awaiting approval from the administrator. To view this list:
- Hover over or click on the **Resources** menu.
- Click on **List Proposed Resources.**
- The **List Proposed Resources** is displayed.

- From here you can view resources by clicking on the title of the resource.

8. Qualifications

It is possible to record a simple list of qualifications that have been achieved, with the ability for administrators to verify this and record their verification.

Qualifications that pass their expiry date will automatically be marked by the system with the Status "Expired". A qualification may be 'renewed' prior to expiry, by editing the expiry date of the existing qualification. It will need to be re-verified in this case. However, if the qualification has expired in the system, it must be re-entered with the appropriate evidence as a new qualification with new date started etc.

8.1. Adding Qualifications

- Hover over or click on the **Qualifications** menu.
- Click on **Add Qualification.**
- The **Add Qualification** screen is displayed.

- Enter a **Name** for your Qualification.
- Enter a **Status** for the Qualification.
- Enter the date **Started, Achieved** and an **Expiry Date** (if applicable).
- Enter any appropriate **Notes**.
- Find your **Evidence to upload** by clicking on **Browse** if you have a document you wish to add to this qualification.
  If you have already added the evidence as a resource, click on the drop down to select a resource to link to your qualification.
- Once you have entered all the information click **Save** to store this qualification.

8.2. Qualifications List

To view the Qualifications List:
- Hover over or click on the **Qualifications** menu.
- Click on **List Qualifications.**
- The **Qualifications List** screen is displayed.
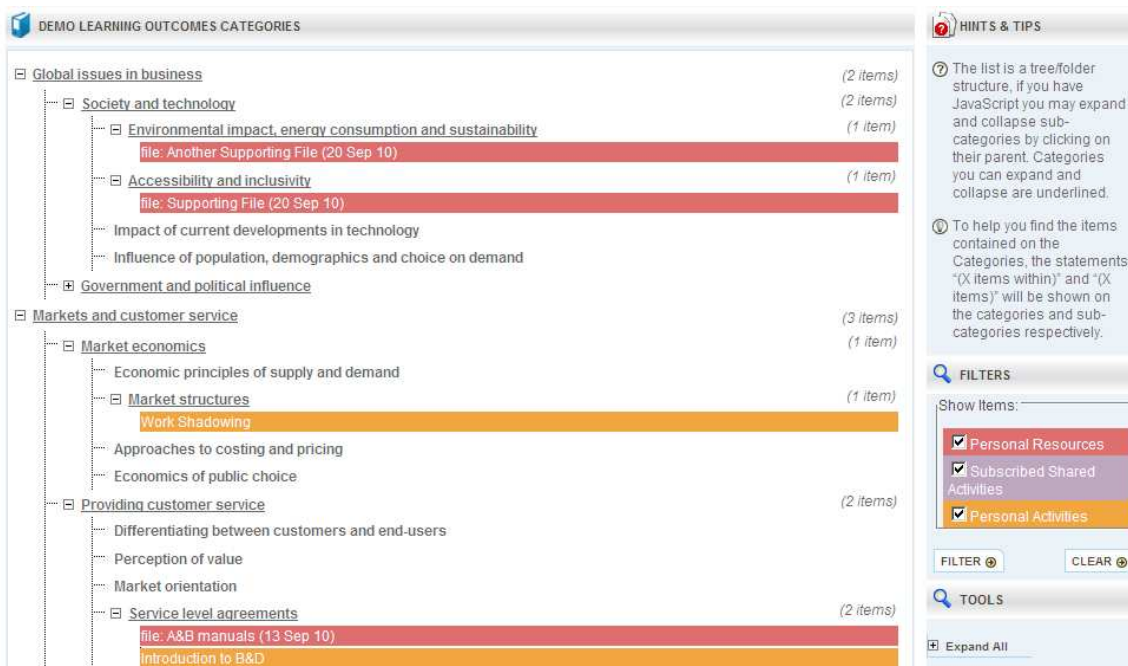
- From here you can **View, Edit** or **Delete** your qualifications by using the links under Action.
- You can also view evidence if you uploaded any during the adding process, by clicking on the title of the evidence under Evidence to upload.

9. Reports

9.1. Categories Summary

- Hover over or click on the **Reports** menu.
- Click on **Categories Summary.**
- The **Categories Summary** screen is displayed.

- Expand the list by clicking the **+** symbol, or **Expand All** on the right hand side.
- You will now see **Personal Resources, Subscribed Shared Activities** and **Personal Activities** that have been linked to categories, either when adding the item or during the activity review process.
- The **Filters** section on the right hand side allows you to filter out specific Item types. It also provides a key, explaining the colours used in the report.

9.1.1. Summary

- Hover over or click on the **Reports** menu.
- Click on **Summary.**
- The **Summary** screen is displayed.

- At the bottom of the screen is the option to **Print Certificate**.
  You can click this button to print your CPD certificate.

Please Note:
- Depending on your system, printing your certificate may lock all past CPD entries, so that they are no longer editable. This is so that the certificate remains valid after printing.