

# CPD Online User Guide

## Accessing CPD Online

CPD Online is an internet-based system. You can access it from any computer with an internet connection.

To access it, open your usual web-browsing program and, in the address field at the top of the browser window, type [www.suffolkcpd.co.uk](http://www.suffolkcpd.co.uk) and hit the Enter key. This will take you to the main CPD Online window. It is a good idea to add this page to your favourites list.

CPD Online is used by several different departments and organisations. The courses that they run are organised into 'channels'. These channels are shown on the main page and each has a different colour. Although you can view and apply for courses across channels, you should choose a 'home' channel that is appropriate to your job and create your user account in that channel.

To enter a channel, just click on the channel title.



## **Section 1: Creating a new user account**

Clicking on a channel title or on the coloured 'learning tree' graphic will take you to the home page for that channel. On the left-hand side of this screen you will see the login box. This is where you enter your username and password to access your personal user account. The first time you use the system, you will need to create your account. To do this, click on the **New User** link, below the login boxes.

**You should only create one user account. Duplicate accounts will be deleted.**

- In the first **New user account** window, you should enter your workplace and contact details. Any field marked with a red asterisk must be completed; if you do not enter any information in these boxes, the system will not let you continue.
- You will need to link yourself to your workplace record as well as your department (if you have one). You can search for this record using either a keyword or the postcode. If there are any matches, they will appear in a list. Click on the correct match to link yourself to the record. You will also see a line of text reading **My establishment is not listed – please click here to enter your establishment name and address details**. By clicking on this text you will be able to create a new establishment record.

Although this will allow you to proceed with creating your user account, you won't be able to apply for any courses until a system administrator has authorised the new establishment. This may take up to three working days, although it will often be much quicker than this.

- **Childminders:** you will not have an establishment, so enter your postcode and click **Search**, and then click on the **My establishment is not listed** link to enter your details.
- **Education advisers (working independently):** please type the word **independent** in the keyword search box, and choose the most appropriate establishment from the results.
- **One-to-one tutors:** please type the word **one** in the keyword search box, and you will see **One to one tutor** as one of the items in the results.
- **Self employed:** if you do not come under any of the above categories, please type 'self' in the keyword search box, and you will see **Self Employed** as one of the items in the results.
- You should choose your own username and password. You must confirm your password by typing it twice.
- The tickbox **Request inclusion in Expertise Directory** is intended for professional advisors (usually from the education sector) who wish to offer their services to organisations such as schools. Please leave this blank unless you need to register as an expert.
- At the bottom of this screen is something called a 'spam filter'. This displays randomly generated words in distorted type, which you must type into the box below. If you cannot read the words, you can generate new ones. You will see a small button marked with two red arrows on the right

– click this button. You can repeat this until you are given a word combination you can read.

- To complete this screen, click **Save**.
- In the following screen, enter details about your ethnicity, gender and so on by clicking on the relevant boxes. For all these details, you have the option not to respond. To complete this screen, click **Save**.
- In the following screen, you can choose if you wish to receive automatic emails about new training courses. If you only want to be notified about particular types of training, you can select individual subject areas. To complete this screen, click **Save**.

You have now created your user account. Now you can log in using the username and password you have chosen.

You can link yourself to additional establishments after you have created your user account. You may need to do this if you have more than one job.

- Click **My CPD Online** and then click on **change contact details**.
- In the next window, you will see the establishment you have already linked yourself to displayed in the drop-down menu. Use this drop-down menu to choose an additional establishment (or create another new one with the tickbox), then click **Save**.

You may expect this to *replace* the current establishment. Don't worry – it doesn't, it *adds* a new one. This process can be repeated as many times as necessary.

**You cannot delete an establishment from your record.** If you need to do this, please email the administrator for your channel (go to the **Contact Us** screen for contact details; this can be accessed from top left-hand corner of the home page).

## **Section 2: Finding courses**

To search for courses, click on the **Search Events** button at the top of the screen. This will take you to the **Development Opportunities** screen. Here you can search all the available courses using various different filters:

- The **Keyword** filter searches for the keyword/s you enter in the course titles and descriptions
- The **Event Code** filter searches for the code you enter, if you already know it.
- The **Starts during or after** filter allows you to choose what date you want your search to start from.
- The **Channel** filter allows you to search courses in different channels
- The **Subject** filter will display courses that address particular subject areas. Different channels have different subject areas.
- The **Target Audience** filter will show courses that are specifically for particular groups of people.
- The **Event type** filter allows you to find particular types of events, e.g. conferences.

You don't have to use any of these filters. If you just click the **Search** button, all the available courses will be displayed.

Many users will want to use the keyword filter to locate courses. The best way to use this filter is to enter the course title, if you know it. You don't have to enter the whole title.

You can also use the **Event Calendar** to find courses. This is displayed on the right-hand side of the screen, and shows the current month. You can use the arrows on either side of the current month display to move through the calendar. If any courses take place on a given date, that date will appear in bold. If you click on a date, you will be shown a list of courses taking place on that day.

### **Section 3: Booking places on events**

When you search for a course, you will be shown basic details about each event. On the right-hand side of each record are three buttons:

- **Request a place** (if the course is full, this button will be labelled **Request a place on the waiting list**)
- **Full details**
- **Print event**

Before requesting a place on a course, you should always click the **Full details** button. Any special requirements or pre-requisites will be shown in this screen, and could be very important. If you click the **Print event** button, the full course record will be printed. The Request a place button is also available in the Full details screen.

To request a place on a course, click the **Request a place** button.

If you created a new establishment to link yourself to when you created your user account, you will not be able to request a place on a course until the establishment has been checked by a system administrator. Instead, you will see a message reading '**A system administrator must authorise your establishment before you can request a place on an event. If you need to do this urgently, email the appropriate channel email address which can be found in the 'Contact us' section on the Home page**'. Remember that no system administrators will be present at weekends and bank holidays!

This will take you to a new screen. A summary of the course details is displayed along with the option buttons from the previous screen. There is an additional button on this screen, labelled **Save event**. If you click this button, the course will be saved to a list, but you will not actually have requested a place on it. This is useful if you are interested in an event, but you aren't sure if you should apply for it or not, for example if you need to check with your manager or consult your diary first. You can see the list of saved events in the **My CPD Online** screen (see below).

If you have any specific requirements, you can enter them in the **Booking Requirements** box. Bear in mind that it may not always be possible to meet requirements, and an administrator may need to contact you to discuss them.

Lastly, you must tick the **I have read and agree to the terms and conditions** box in order to proceed. Click on the **Terms and Conditions** link next to this box to view them.

To complete your request, click **Submit**. If you do not wish to continue, click **Cancel**.

A new screen will appear. You will see your unique request reference number, and a message reading

**Thank you for booking your training with Suffolk CPD Online. A confirmation email will be sent to you soon.**

**IMPORTANT - Please note: You will not be allocated a place on this course without your manager's/CPD leader's authorisation.**

The **CPD leader** is the person who authorises your training requests. This will normally be your manager. This person must already have set up a user account and then contacted the channel administrator by email or telephone to request that they be made the CPD leader.

The CPD leader will be emailed every time a member of staff in their workplace requests a place on an event. The CPD leader can then approve or decline the request by clicking the appropriate link in the email.

When your request is authorised or declined, you will receive an email. If your place has been authorised, a system administrator must then confirm or decline your place. Unless there is a particular reason why you should not be allowed to attend an event, your request will be confirmed. You will receive another email to tell you your place has been confirmed. You now have a secure place on the event. All the details you require, including a link to a venue map, are available in the event record on CPD Online.

If your request is declined, you will not be allocated a place on the event.

If the event is already full, the **Request a place** button will instead be labelled **Request a place on the waiting list**. If you click this button, you will be taken through the request process but will be added to a reserve list instead of being allocated a place. If a place does become available, you will be contacted by email and given the opportunity to accept or decline the offer of a place on the event. If there are other people on the waiting list, they will also be offered a place; the place or places will be allocated on a first come, first served basis.

**Waiting lists are only kept for individual events.** If you can attend an alternative event, you must request a place on that event in the usual way.

## **Section 4: Managing your account with my CPD Online**

When you have logged in to the system, you can manage your account using the **My CPD Online** screen. You access this by clicking the **My CPD Online** button at the top of the screen.

The following options are available in this screen:

- **Change username & password**  
Use this option if you want to change your username and password. For example, if someone else has created a user account on your behalf, you may want to change your login details so that only you know them.
- **Change contact details**  
If any of your details, including your name, job title, workplace, telephone number or email address change, you can update them here.
- **Update your email alerts**  
CPD Online can update you with automated emails about new and upcoming events. When you first create a user account you are asked whether you want this option and for what types of event. If you want to change these details, you can do it here.
- **Update your equal opportunity responses**  
If you want to change the data the system holds about your ethnicity, gender etc. you can do it using this option.
- **Events due to attend and booking status**  
This option shows you what events you are due to attend. It will also show you whether requests you have made have been authorised by your CPD leader and/or confirmed by a system administrator.
- **Cancel a booking**  
This allows you to cancel a confirmed place on an event. Please note that cancellation policies may vary between events in different channels. If you cancel a place, you will receive a warning if you are likely to be charged.
- **Events attended**  
This option allows you to see all the events you have attended. Please note that this will only show events from the new CPD Online system – it will not contain records of events you may have attended prior to the system going live in April 2011.
- **Saved events**  
This option allows you to view your saved events. If you have found an event you are interested in but you do not want to request a place immediately for some reason, you can save the event so that you can locate it easily later on. You save events in the individual event record (see **Requesting a place on an event**).
- **View other events**  
This shows you a list of any events you have attended that you did not access via CPD Online. You add these events yourself using the next option...
- **Add event**  
This option allows you to add basic information about events you have attended that you have not accessed through CPD Online. This means you can keep a record of all your activities in one place.

## **Section 5: CPD Leaders – managing training for other members of staff**

### **Becoming a CPD Leader**

To become a CPD leader, please contact the system administrators for the relevant channel. You will find email contacts in the **Contact Us** page. The link to this page can be found in the upper left-hand side of the screen. Email the appropriate address with the name of the CPD leader and their workplace/department.

A user who has been made a CPD leader will have a **CPD Leader User Tools** box in their **My CPD Online** screen.

More than one person can be made a CPD leader for an establishment.

### **Authorising requests from other members of staff**

As a CPD leader, you will automatically receive an email every time one of your colleagues requests a place on an event. The email will tell you who has made the request, and the name of the event. It will also contain a link which will take you to the **Unauthorised Booking Requests** page on CPD Online, where you will be able to authorise or decline the request.

If there is more than one CPD leader for an establishment, they will all receive these emails. However, only one CPD leader needs to respond. The first response will be the one that is actioned. The system will simply ignore later responses.

**Schools please note:** Headteachers who are CPD Leaders may not wish to receive authorisation emails. If this is the case, please email [LISevents@suffolk.gov.uk](mailto:LISevents@suffolk.gov.uk) and ask for this designation to be removed. Any member of staff can be given CPD Leader rights, which means they will be able to book or authorise other staff members on events. Please email [LISevents@suffolk.gov.uk](mailto:LISevents@suffolk.gov.uk) to request this authorisation

### **Applying for a course on behalf of another member of staff**

A CPD leader can apply for events on behalf of other members of staff.

- First, login and locate the required event. Click on **Request a place**. In the following screen, underneath your own name in the **Your name** field, is a link labelled **Request a place on behalf of a colleague**. Click on this link.
- A drop-down menu will appear, containing all the staff in your workplace who have already created user accounts in CPD Online. Use this menu to locate the colleague you want to attend the event.

**Please note:** If a colleague has already created a user account and booked a place on the course, they will *not* appear in the drop down list of staff for that course. Please check for events booked for colleagues using the CPD Leader Tools (see below) before trying to add a new colleague.

If the colleague has not already got an account on the system, click the link labelled **Click here to add a colleague**.

In the following window, enter the colleague's name, job title, workplace and email address. Then click on **Submit**.

You will now be returned to the request screen. The name of the newly-added colleague will appear in the **Colleague's name** field.

The colleague will receive an email advising them that an account has been created for them, giving login details.

- At the bottom of the screen you can choose whether you want email messages about the event to go to the colleague, to yourself, or to both.
- You will need to click the **I have read and agree to the terms and conditions** box to complete the request. Then click the **Submit** button.

You have now requested a place on the event for your member of staff. Even though you have requested the place on their behalf, you will still receive an email asking you to approve or decline the request for them.

To book several different colleagues onto a course or onto several courses, repeat the process above.

#### Using CPD Leader Tools to manage training

If you are a CPD leader, you will have access to **CPD Leader Tools**. You can find these in the **My CPD Online** screen. These tools give you the following options:

- **Events I have booked for colleagues**  
This will show you which members of staff you have requested event places for, and which event/s. You can also cancel places from this screen.
- **Events colleagues are due to attend**  
This screen will show you which events your staff are confirmed on and which they are due to attend.
- **Events attended by colleagues**  
This shows you which events your staff have already attended.
- **Event reports**  
This report is another way to show what courses staff have been booked on to.
- **Colleague report**  
This report shows whether colleagues attended or did not attend events they were booked on to.
- **Unauthorised booking requests**  
This shows you if any colleagues have made a request for a place on an event that requires authorisation from you.