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CPD Essentials User Guide

A practical introduction

cii.co.uk/cpdessentials



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The following user guide provides a practical introduction to CPD Essentials.

It works through the different areas of the tool, the key functionality that you will find and the terminology employed on the site.

We recommend that you take your time to read this and to familiarise yourself with the guidance it provides. This will enhance your user experience and help you get the most from CPD Essentials.

The Chartered Insurance Institute

The Chartered Insurance Institute (CII), is a professional body dedicated to building public trust in the insurance and financial planning professions. Our 125,000 members commit to high professional standards and continuing professional development.

We work with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Success in CII qualifications is universally recognised as evidence of knowledge and technical expertise.

Our members are able to drive personal development and maintain their professional standing by adhering to our Code of Ethics and by accessing an unrivalled range of learning services.

Find out more at: cii.co.uk



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Please forward any views you may have on the service you receive, whether they are positive or otherwise.

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Glossary and terminology

Terminology

Portlet

A window which retrieves data from another part of CPD Essentials to provide you with quick access to the areas you most frequently use.

CPD

Continuing Professional Development.

Activity

An item on CPD Essentials which could be either a piece of learning or assessment.

Types of activity available in CPD Essentials



Programme

A combination of learning material and assessments.



E-learning

An individual item of learning that offers information in text format. Can be sent to you a page at a time by email.



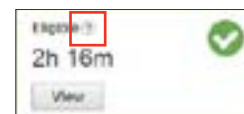
Assessment

A test consisting of multiple choice questions.

You can navigate to any part of CPD Essentials by clicking on **Menu** next to the Home button, top left (screenshot below).



Additional guidance



? icons appear throughout the site and contain additional guidance to aid understanding and use. Mouse over the ? icon to see the additional guidance.

The home page

The screenshot shows the CII CPD Essentials home page. The page is divided into several sections:

- Continuing Professional Development:** Shows the current status as 'Incomplete' with a progress indicator at 0h 00m. A red box highlights this section, with an annotation: "Current CPD status and direct access to view and record CPD activity."
- Incomplete CPD:** Lists activities that require further information before being included as CPD. A red box highlights this section, with an annotation: "Activities which require further information before being included as CPD."
- My Training Plan:** Lists six training modules, all marked as 'Not Attempted'. A red box highlights this section, with an annotation: "CPD activities to complete. Each item is a programme containing a number of e-briefings to work through."
- Welcome:** Provides a welcome message and instructions on how to use the CPD Essentials platform.
- CPD Essentials News:** Lists recent news items, such as 'Budget 2016 and tax tables' and 'Autumn Statement, 25 November 2015'.
- Useful Links:** Provides links to external resources, including the Chartered Insurance Institute, Personal Finance Society, Department for Work & Pensions, Financial Conduct Authority, HM Revenue & Customs, Money Advice Service, National Employment Savings Trust, Pensions Advisory Service, and Pensions Regulator. A red box highlights this section, with an annotation: "Useful links to external resources."

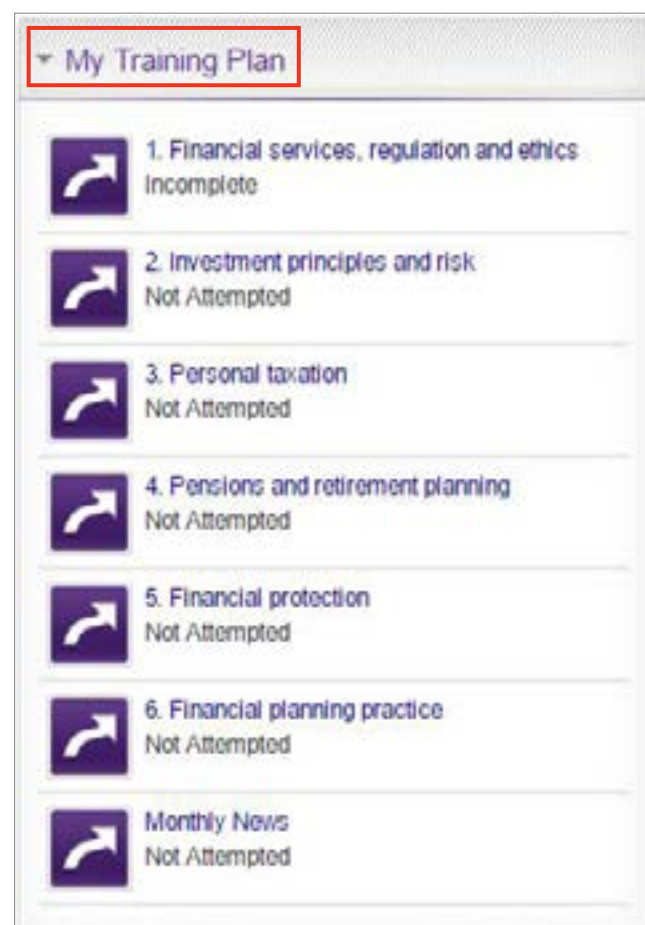
The page also features a 'HELP & FAQ' button and a 'Profile' link in the top right corner.

My Training Plan

CPD Essentials activities for you to complete are displayed in the **My Training Plan** portlet on the Home page (screenshot below).

Once you have successfully completed an activity it will automatically be removed from this portlet.

To see a list of all your activities and their current status, click on the portlet title or select **My Training Plan** from the **Menu** at top left of the Home page.



Activity status

The typical status progression is:

- **Not Attempted** – you haven't begun the activity.
- **Incomplete** – you've accessed the activity but not finished it.
- **Complete** – you have successfully finished the activity.

Send learning via email

Firstly, access your learning by opening an item in **My Training Plan**. This will present you with a **routemap**. Click on a title in the routemap image to access the learning activities for that subject.

Select the **Send by email** icon beneath the activity title and set a date for when you wish to start receiving the material.

You can also choose whether to receive a page seven days a week or just on weekdays.

Activity	Details	Status	Planned Date
 1.1.1 Role and structure of the UK and international markets: key participants  Send by email	Info	Not Attempted	None

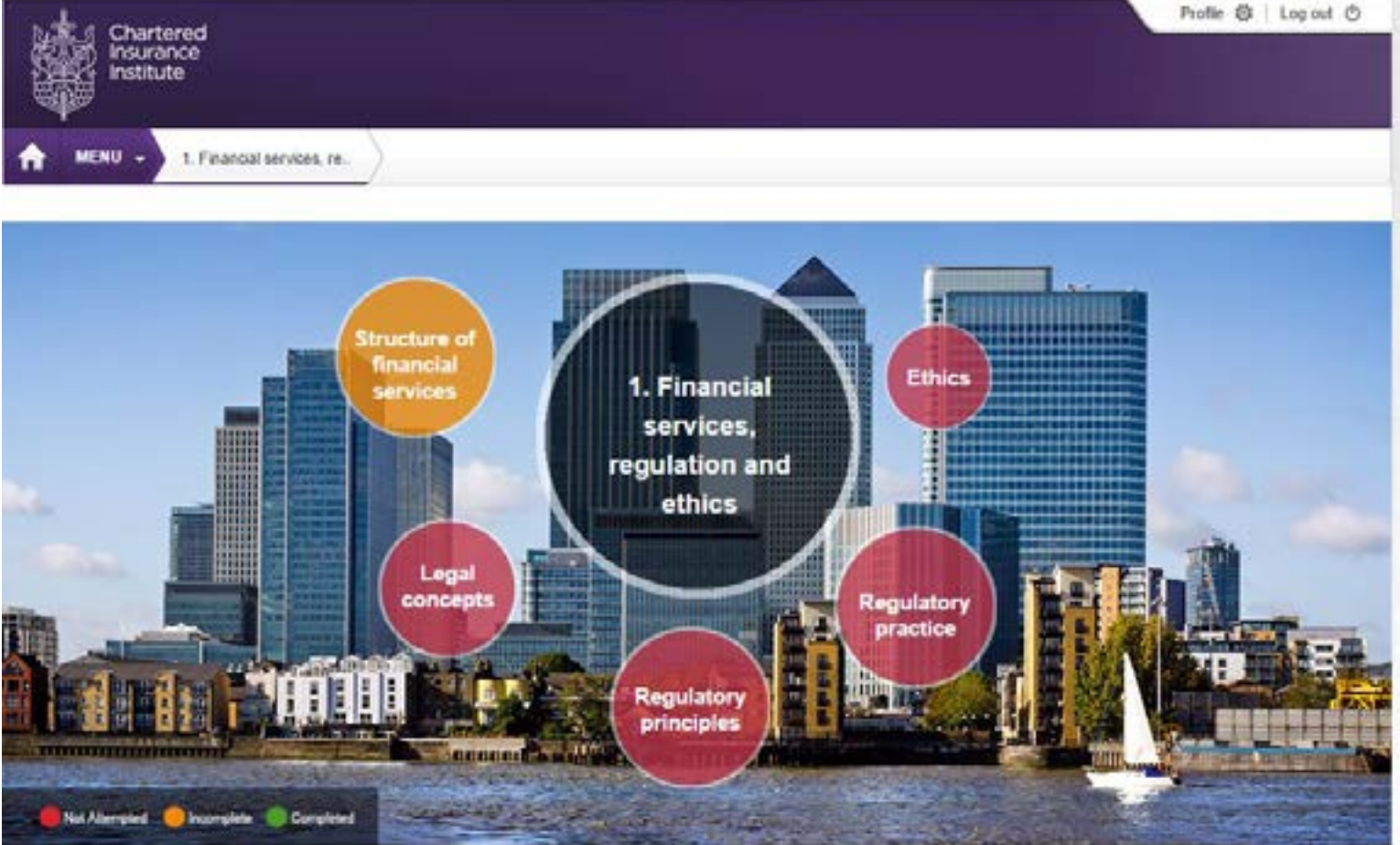
Setting reminders

You can set email reminders for your CPD activity in general. To edit your email preferences, go to the **Profile** link at the top right of your screen and select Settings from the left hand menu.

Tick the **Send To Do List/Training Plan emails** checkbox then select the frequency (daily, weekly or monthly) you wish to receive the email reminders.

Select **Save Changes**.

Editing time spent on activities



Chartered Insurance Institute

Profile | Log out

MENU 1. Financial services, re.

Structure of financial services

1. Financial services, regulation and ethics

Ethics


Legal concepts

Regulatory practice

Regulatory principles

Not Attempted Incomplete Completed

Structure of financial services

Activity	Details	Status	Planned Date
 1.1.1 Role and structure of the UK and international markets: key participants Send by email	Info	Completed	None

Attempt Summary

Status: Completed

Time Spent: 00:18:00

Attempts: 4

Last Attempt: 04/11/2017

Completed On: 03/11/2017

Reflective Statement: Reflective Statement Here

Edit

Double click on the time spent and a dialogue box will open to allow you to edit it.

Click on the downward arrow by the status for the activity you want to amend.

Recording and managing Continuing Professional Development (CPD)

Setting your CPD year start date

When you first access CPD Essentials you will need to set your CPD year start date to activate the CPD log. Once set, you can update the start date at any time by clicking on the **Profile** link at the top right of any page and then selecting **Settings** from the menu on the left side of the screen.

Editing the time spent on activities outside of CPD Essentials

Activities completed on-screen within CPD Essentials are automatically tracked and the amount of time spent on the activity stored and added to the record for that activity. If you choose to save or print an activity (where applicable) and study it offline in your own time, CPD Essentials will only record the amount of time the activity was open while you saved/printed it and not the time you subsequently spent studying it.

You can manually amend the time spent on an activity to reflect the actual time you spent if you completed it outside of CPD Essentials.

To do so, follow these steps:

- Go to **'My Training Plan'**.
- Change the view to **Completed** activities if necessary.
- Click the Status (e.g. completed, incomplete) in the **'Progress'** column next to the activity you want to update.
- Under **Attempt summary** click on the blue highlighted time field next to Time spent and amend the time.
- Click **Save** to update.

Some activities will not allow you to change the time spent yourself. In this case, please contact your organisation's CPD Essentials administrator and they will be able to do it for you.

Automatically recorded activity

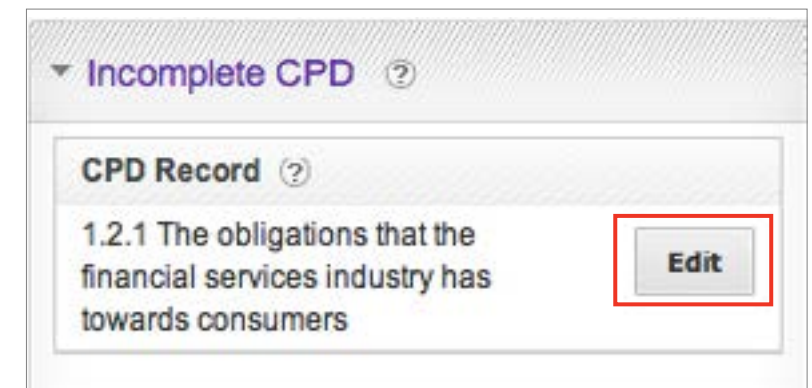
Once you complete an activity within CPD Essentials (including the knowledge check tests) it will be added to the **Incomplete CPD portlet**. Note that each individual item of learning, rather than the programme as a whole, will be added to the CPD log upon completion.

To make the activity count towards your CPD, click on the name of the activity within the CPD Log and provide a 'Reflective Statement' and 'Development Need'. This will mark your CPD record as 'Completed'.

Adding a reflective statement

To ensure an activity is eligible for CPD you will need to add a reflective statement which explains if the activity met the learning needs it was intended to cover.

Click on the **Edit** button to add your reflective statement.



Recording and managing Continuing Professional Development (CPD)

Adding other activity

You will need to manually add any CPD activities you complete outside of CPD Essentials, for example, attending training courses or conferences.


The **Current Status** field above the dial (see below) will remain as **Incomplete** until you have recorded 35 hours of CPD activity including a minimum of 21 hours structured CPD activity.

Clicking on the **Add CPD Activity** button lets you record the details of the activity.

You must complete all the mandatory fields, indicated with a red asterisk*, then click the **Add** button for it to count on your CPD log.

Continuing Professional Development ?

Current Status: Incomplete



0h 40m

CII minimum requirements not met

CPD Year starting on 1/1/2017

There are **6** months left in your CPD period.

Add CPD Activity ? See example of completed CPD record

Please complete all mandatory fields (*) to ensure your CPD is recorded as complete on the system.

Development Need* ?

Activity* ?

Activity Description/Learning Objectives* ?

Start Date ?

End Date* ?

Activity Status ?

Time Spent* ?

 hours minutes

CPD Activity Type* ? See examples

CPD Category* ?

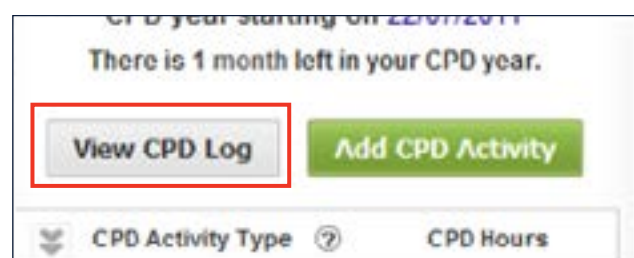
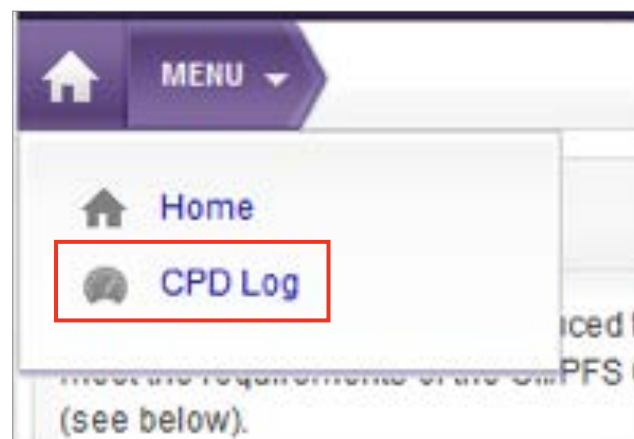
File Attachments ?

Reflective Statement* ?

Recording and managing Continuing Professional Development (CPD)

CPD log

To print, export (download) or view historical CPD activity, go to your CPD Log which can be accessed by clicking on the **CPD Log** link under Menu or by clicking on the **View CPD Log** button in the **Continuing Professional Development** portlet.



From the Actions box you can add a new CPD activity, view Removed CPD, Print or Export a copy of your CPD record or amend your CPD start date in Settings.

The export/import functionality enables you to download a copy of your CPD Log or export/import your records between the various CII CPD recording tools (CII CPD online planning and recording tool or CII Assess systems).

The **CPD Status** box contains the same information as the Continuing Professional Development portlet on your Home page but with the added ability to select the CPD Year you wish to view. This enables you to select previous years to view your past CPD history. To change the year, select the year you wish to view from the dropdown list.

CPD Activity	Date Completed	CPD Status	Hours
1.2.1 The obligations that the financial services industry has towards consumers	3/25/2017	Incomplete	3h 00m
Example activity	1/23/2017	Completed	5h 00m
Total			8h 00m

You can sort the information by clicking on one of the column headings.

Beneath the table of CPD records you will see subtotals for **Completed** and **Incomplete** time and an overall **Total**.

In the centre of your screen will be a table displaying your full list of CPD Activity for the year you have selected from the CPD Status box. Clicking on an activity name will open the item enabling you to edit it.

Recording and managing Continuing Professional Development (CPD)

Removing CPD activity from your log

If you wish to remove a CPD Activity from your CPD log, select the cross to the right of the CPD activity in the table



then select **'Yes, remove the activity'** to confirm the removal. As detailed below you can restore removed CPD, however should you wish to permanently delete the activity you must also tick the 'I would also like to delete this CPD activity' box.

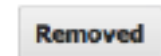
Would you like to remove this activity from your CPD log?

By removing the activity from your CPD log, it will no longer count towards your CPD year. Providing you don't permanently delete this, you can add at a later date.

I would also like to delete this CPD activity.

Yes, remove the activity Cancel

Any CPD activities you remove will still be accessible under the **Removed CPD** button in the **Actions** box.



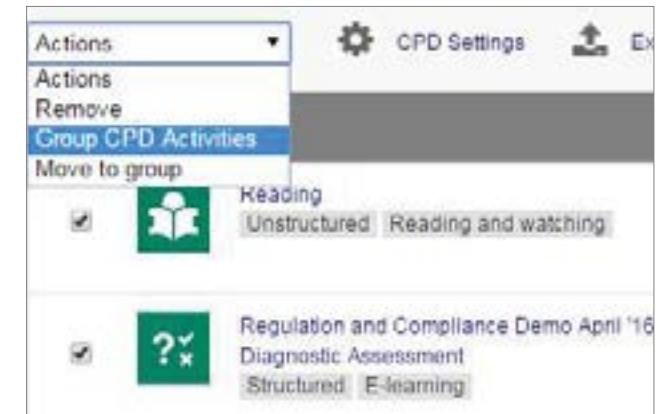
If you wish to reinstate an activity, locate the activity and select it by ticking the checkbox next to the activity name. Once selected, click on the **Restore** button.



Grouping CPD

Grouping CPD allows you to apply one Development Need, Learning Outcome and Reflective Statement across multiple CPD activities.

To group CPD activities, tick the boxes next to the activities you wish to include and select 'Group CPD Activities' from the **Actions** drop-down menu.




You will then be presented with a pop-up window where you can add your Activity Group Name, Development Need, Learning Outcomes and Reflective Statement.

You can move more activities in your CPD Log to the group by ticking the activity, selecting 'Move to group' under the drop-down menu and picking your group from the list. You also have the ability to create new CPD activities within the group by clicking on the plus icon.



Click here to expand the group.

Click here to remove and activity from the group.
Click here to create new activities within your group.

To remove any item of CPD from a group, select the  icon to the far right of the activity. You can delete a group by simply removing all the activities within it.

Synchronising your records across various CPD tools

If you currently hold CPD records across more than one of the CII's CPD systems: CPD Essentials, the CII CPD planning and recording tool or Assess you can now combine these into one single record.

There are two main options available to you:

1. Create a combined record within the free CII CPD planning and recording tool. To do so, log in to CPD Essentials or Assess and select **'Synchronise My CPD'**.
2. Alternatively, you can create a combined record by exporting and then importing your records into any one of the three designated systems: CPD Essentials, the free planning and recording tool, or Assess. To do this, log-in to the system that you want to export your records from. Then go into **'View CPD log'** and click on the **'Export'** button where you will see a message asking you to confirm which year's records you wish to export, and follow the on screen instructions. Once your record has been exported and saved, log in to the system you wish to import to. Then go into **'View CPD log'** and click on the **'Import'** button. Select your file from the saved location and click the import button once more. Your imported record will appear in your CPD log.

Please note that it is not possible to export and import records for multiple years simultaneously, they must be done one year at a time.

Activity and progress reports

You can run reports on your activity within CPD Essentials by selecting the **Reports** link from the **Menu** button.

Using the My Activity Completion Status report as an example:

- Leaving the **Activity Name** filter blank will show all activities.
- The information can also be filtered to only show activities you've completed, for example, by selecting the appropriate filter within **Completion Status**.

You will need to have actually used CPD Essentials for the reports to show meaningful information. Reports can also be scheduled to run automatically and emailed to you. Click on the **Email Report** link to set this up. Reports can also be exported in a number of formats for use outside of CPD Essentials including CSV, Excel and PDF.

The screenshot shows the Chartered Insurance Institute CPD Essentials interface. The top navigation bar includes the logo and the text 'Chartered Insurance Institute'. Below this is a breadcrumb trail: 'MENU' (with a dropdown arrow), 'Reports', and 'My Activity Completion St.'. The main content area is titled 'Complete any filters (if applicable) as required.' and contains several filter sections: 'Activity Name:', 'Completion Status:', and 'Activity Type:'. A red box highlights the 'Completion Status' dropdown menu, which is open and shows four options: 'All', 'Completed', 'Incomplete', and 'Not Attempted', each with a checked checkbox. Below the filters, there is a note: 'Note: Report only shows first 1000 records'. At the bottom of the page, there is a pagination control showing '1 of 1' and a 'format' dropdown menu.

Profile

You can access your **Profile** using the link at the top right of the Home page. Within the personal details area you can view the personal information against your account. Personal details cannot be updated on CPD Essentials. Should you need to update the details on your account please contact Customer Service on +44 (0)20 8989 8464.

Settings

You can also set up regular CPD status emails.

If you wish to receive regular reminders about learning activities in your **My Training Plan**, tick the checkbox under the Reminder Email Preferences section on your **Settings** page and choose the frequency and day of the month.

Click on the **Update** button beneath the sections to save your changes.

Password

To change your password, select **Password** from the left hand menu and complete the fields. Select **Change** to save your new password.

If you forget your password, you will need to click on the **Can't access your account?** link on the pre-login page to reset.

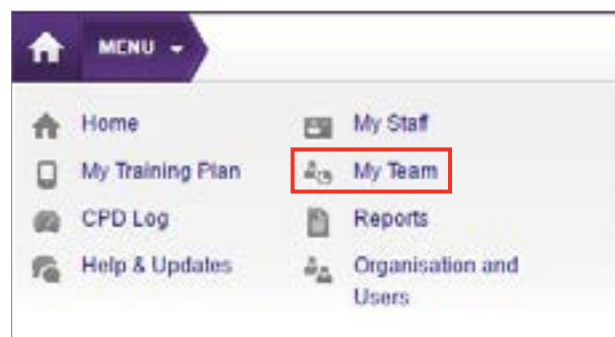
Manager functionality – monitoring staff activity

This section will only be relevant where a firm has purchased CPD Essentials for staff and elected to make one person responsible for monitoring and reporting on usage.

The following information is only for users who have been given that role.

My Team page – basic functions

Select the **My Team** link in the **Menu**.

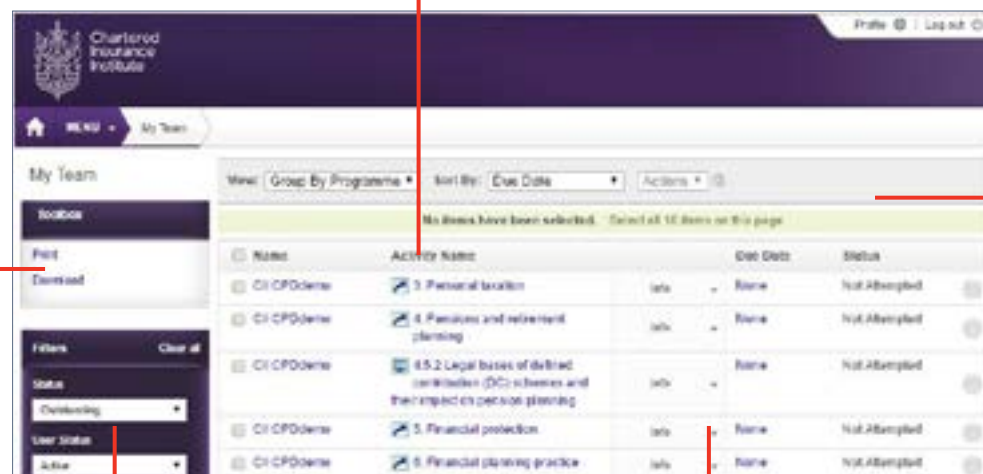


This page displays a list of all the CPD Essentials users in your organisation and the activities assigned to them. By default, this will be all the learning material provided in the system.

Print a copy of the current view or Download a copy.

Use the **View** and **Sort By** dropdown lists to filter by staff activity.

Select a member of staff using the check box to the left of their name to activate the **Actions** list.

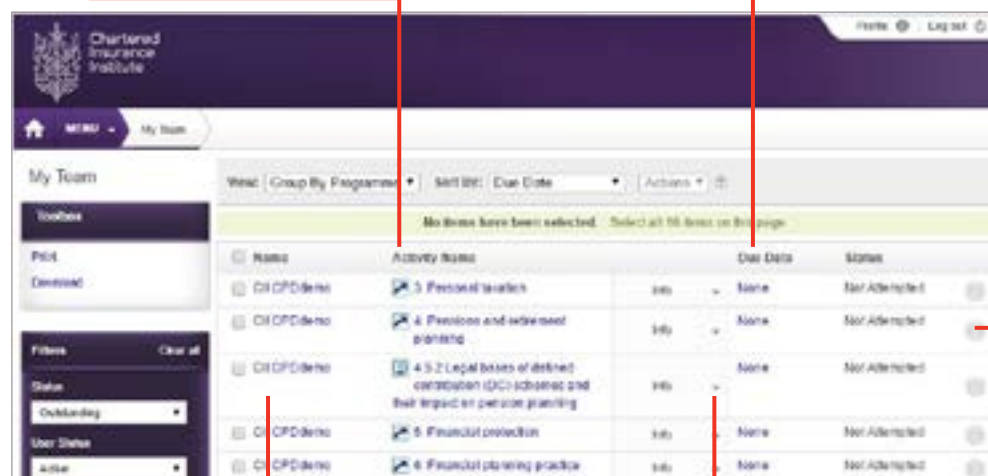


Search and filter options to narrow and sort what is displayed.

Selecting the arrow next to **Info** displays further details about the activity.

Click on **Activity Name** to see all the individual activities that make up that programme of learning.

Add or edit a **Due Date** for the activity.



Selecting a **Name** will take you into that person's **Profile**.

Expand to show further information about the activity.

The circles beside each activity change colour as the **Status** changes.
 Grey – not attempted.
 Orange – indicates the activity is in progress.
 Red – past due date for completion (if date set).

Manager functionality – tools

Adding, changing, removing

If no **Due Date** has been set then the word **None** will be displayed.

If you wish to edit a due date for an activity then click on the date (or **None** to add one).

To remove a due date, click on it and tick the box **No due date**.

Filtering and managing large lists

The default view will not show completed activities.

To view completed activities change the **Status** drop-down to **Completed**.

Alternatively, select **All** from the drop-down to view all activities whether not attempted, in progress or completed.

Filters Clear All

Status
Outstanding

User Status
Active

Activity Name

User Name

Line Manager Name

Due Date From

Due Date To

Search

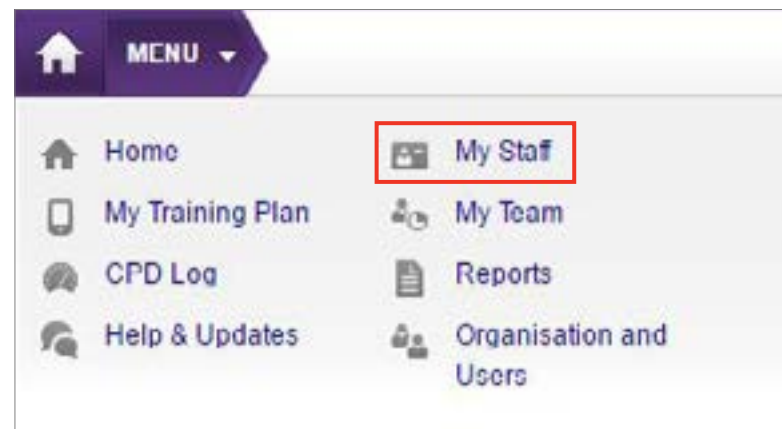
Other staff actions

If you select a staff member by clicking the tick box to the left of their name, the drop-down (located above the list of staff) will become active.

The **Actions** button will enable you to cancel a registration (i.e. delete an activity from the individual's **My Training Plan**) and provides an alternative way to change the due date for an activity.

My staff

The **My Staff** page lists all the CPD Essentials users in your organisation and can be accessed via the **Menu**.



Chartered Insurance Institute

Home MENU Staff

Show: My Direct Reports All My Reports

First Name	Last Name	User Name	Mobile
CPD	Essentials	cdessentials	
Harry	Die	harry.die@charnait.com	
Jane	Smith	jane.smith@charnait.com	

Click on a name to view their profile.

Staff profile

Via the individual's profile you will be able to:

View their Personal Details.

View their Employment Details – Although you will see a number of fields within the **employment details** section, the only field populated will be your **started date**. All other fields in this area will be blank and cannot be edited. The functionality to edit these fields is available on other products using the same platform, however this is not available on CPD Essentials.

Amend **Settings** such as their CPD year and email reminders.

Upload relevant **Documents** to their profile.

View their **My Training Plan**.

View their **CPD Log**.

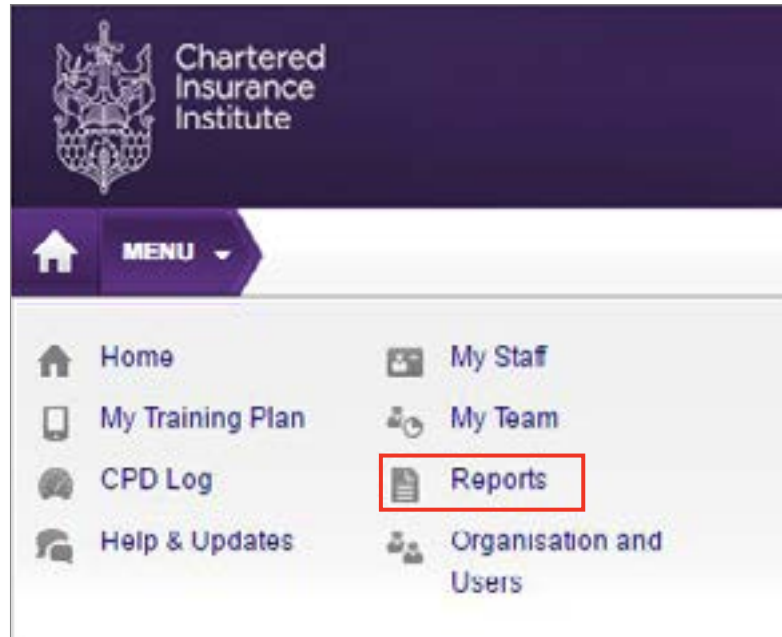
Details

- Employment Details
- Settings
- Documents
- To Do List
- CPD Log

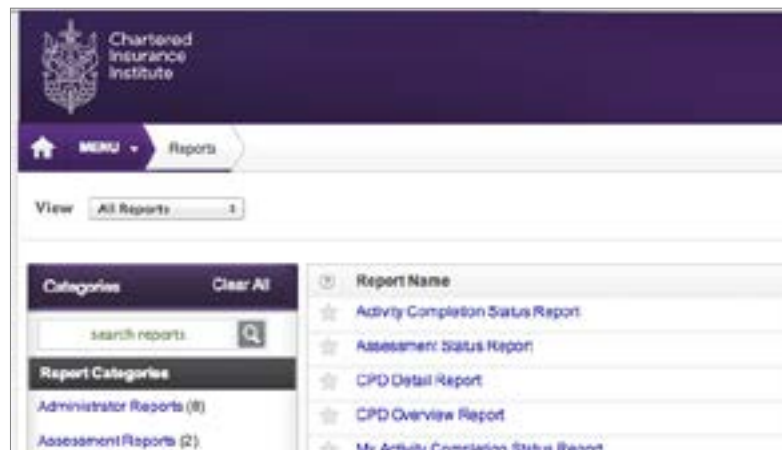
Manager functionality – reporting

Reports

To access, select the **Reports** link under the **Menu**.



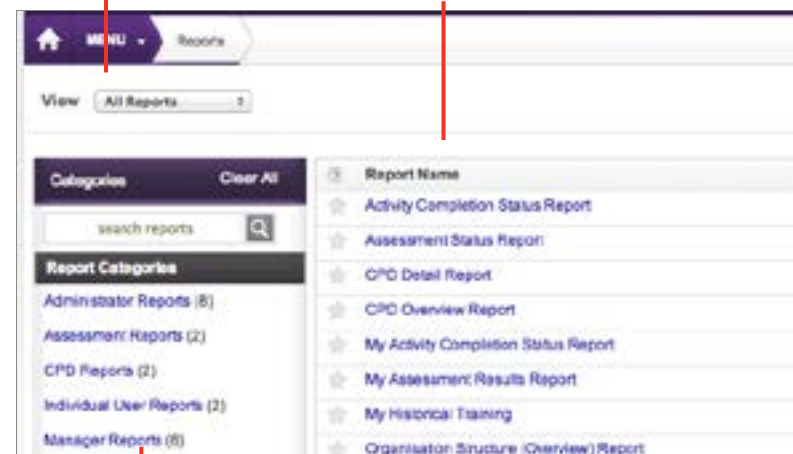
When you access the **Reports** section, you will see a list of pre-configured reports. These are the only reports available in CPD Essentials. It is not possible to create your own reports.



Click on a **Report Name** to run it.

Filter the results of your report, e.g. to show only completed activities, by selecting from the drop-down and/or typing text into the fields available, (e.g. show only Activity Names containing the word Taxation). Click on **Run Report** again to update the results.

Filter report results.



Use **Save As...** to create a copy of this report, maintaining all filters.

Export a copy of the report, choosing the format via the drop-down menu, and then clicking **Export**. Available formats are PDF, CSV, Excel, Rich Text Form, TIFF file, Web Archive.

Schedule a report

You can schedule a report to run and be emailed to you or another member of staff on a set date and time.

On the **Reports** home page, click on the downward arrow beside **None** in the column labelled **Schedule**. Click **New Scheduled Email**.

Work through the three step wizard.



Step one – filters

On the first step of the wizard you can choose any filters for the report. Click **Next** to choose who to send the report to.

Step two – recipients

Use the **Filter and Unit** search fields on the right to locate and then select the recipients. As you select the names of the recipients they will appear in the middle of the screen. Once you have chosen all the recipients, select **Next** to go to the final step.

Step three – frequency

Set the report to run at a single date in the future or to run on a regular basis starting from a set date and time. Once you have chosen, select **Finish**.