



CPD Scheme Help Guide

## **CONTENTS**

1) **GENERAL** 

	1.1 About this guide	1
	1.2 About the CPD Scheme	
	1.3 System Compatibility	
	1.5 System companionty	5
2)	SYSTEM SET-UP	
•		
	2.1 Setting up your CPD year	5
	2.2 Requesting a date change for your CPD year	. 9
	2.3 Requesting CPD reminders from the CISI	10
	2.4 Allowing Superuser access to your CPD log	12
3)	DATA INPUT	
	3.1 Adding a CPD entry	.14
	3.2 Importing entries onto your CPD log	.18
	3.3 Uploading supporting evidence to a manual CPD entry	.22
	3.4 Editing an existing manual entry in the CPD scheme	.26
	3.5 Editing an existing CISI auto-logged entry in the CPD scheme	.29
	3.6 Copying an existing CPD entry	.32
	3.7 Removing an existing CPD entry	.35
4)	VIEWING DATA	
	4.1 Viewing CPD entries	27
	4.2 Filtering CPD entries displayed in a CPD year	
	4.3 Viewing Superuser emails in a CPD year	
	4.4 Viewing certificates for previous CPD years	
	4.4 Viewing certificates for previous CPD years	44
5)	DATA OUTPUT	
	5.1 Exporting CPD entries to excel	45
6)	DECLARING YOUR CPD	
	6.1 How to declare your annual CPD	48
7)	SIGNING OUT	
	7.1 Signing out of the CPD Scheme	50
	7.1 Jigiiiig out of the of Doniellie	

## **1.1 ABOUT THIS GUIDE**

This document is composed of a list of 'Help Topics' that aim to provide instruction for operating the CISI CPD Scheme and for frequently performed tasks within the system. A topic consists of 'Background' and 'Action' sections that use a step by step methodology for each process.

Please note that the CISI cannot be held responsible for any internal IT issues that may affect the performance of the log.

## 1.2 ABOUT THE CISI CPD SCHEME

The CISI CPD Scheme enables users to demonstrate their compliance against the CISI CPD requirements. The CISI CPD Scheme is only available to members of the CISI, or non-members issued with vouchers by CISI Corporate Supporter Firms.

When registering on the CISI CPD Scheme you will experience the following steps:

- After choosing your start date which can be back dated up to eleven months you will be given exactly one year from that date to complete the requisite hours
- When you participate in any of the CISI's CPD opportunities your CPD log will be automatically updated with the details, with no need for any manual input from you
- You will need to log any non-CISI CPD activities manually. You are strongly urged to collect
  and retain supporting evidence in case selected for audit The CISI CPD Scheme helps you
  achieve this by allowing you to upload evidence or other relevant documents as you go.
- You will receive regular e-mail alerts to remind you of what CPD you have achieved to date and what still needs to be done.
- Please note that any CPD activities undertaken during the 28 day grace period following a
  CPD log's end date, will NOT contribute towards the respective CPD logs requirements. As
  the activities have been completed past the CPD period's end date the hours will contribute
  towards the completion of requirements in the new CPD period. The grace period for a CPD
  log that has ended only allows the members access to add information of CPD activities that
  was completed within the respective CPD period.
- After this four-week period, no further activities can be logged against the CPD log for that particular year and your log becomes officially 'closed'.
- Once a year ends (i.e. from the start of the grace period), you can begin logging activities for your next CPD year to maintain your continuing learning cycle.
- On completion of each year of successfully-logged CPD, the CISI awards a certificate, allowing you to demonstrate to your employer and the regulator that you remain competent.

For more information on the CISI CPD scheme, please visit <a href="www.cisi.org/cisiweb2/cpd/completing-your-cpd">www.cisi.org/cisiweb2/cpd/completing-your-cpd</a>

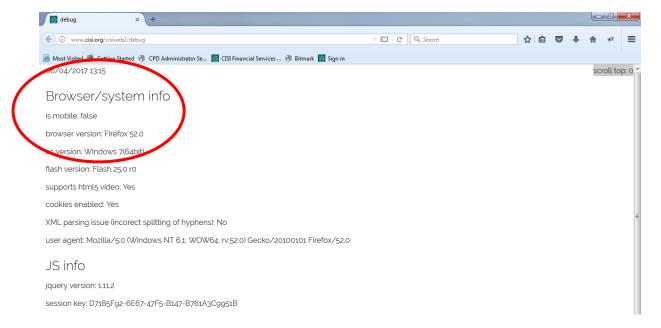
## 1.3 PC and Browser Use

The CISI CPD Scheme is compatible with the following web browsers:

PC	Mac	Android	iPhone/iPad
Internet Explorer 11	Safari	Chrome	Safari
Edge			
Chrome			
Firefox			

All the above browsers should be fully patched / updated when using the CISI CPD log.

If you are unsure which browser you are using, visit – <a href="http://www.cisi.org/cisiweb2/debug">http://www.cisi.org/cisiweb2/debug</a> (See page below). This will reveal the browser that you are using, along with the operating system.



## **Adobe Acrobat**

Users will require Adobe Acrobat Reader to view some of the accompanying documents. It is recommended that the current version of Adobe Acrobat Reader is used to view these documents.

## **Microsoft Excel**

The CISI CPD Scheme has been tested for use with Microsoft Excel. Any similar software using the .xls or .xlsx file extensions could theoretically be used, and other spreadsheet software using this file extension (such as Lotus 1-2-3 and spreadsheet packages within Google docs and open office) will need to be installed to ensure full functionality of the CPD log.

## **Terms and Conditions**

The CISI accepts no responsibility for use of the CISI log on any other browsers or platforms.

The CISI strongly recommends that users consult with their IT department before downloading any software and the CISI will not be responsible for any issues caused by the downloading or use of any of the recommended software.

Most computers and computer networks will have Firewalls and Internet Security installed. The CISI cannot accept any responsibility for any barrier to access that any security features may cause. If you are unable to use the CPD log because of security features please contact your IT support department. Computers also have different configurations and as such the CISI cannot guarantee that the CISI CPD Scheme will work on every PC and in all circumstances using the above browsers.

Users of the CISI CPD Scheme do so at their own risk. The CISI accepts no responsibility for any issues caused by use of this log.

## **SETTING UP YOUR CPD YEAR**

## **BACKGROUND**

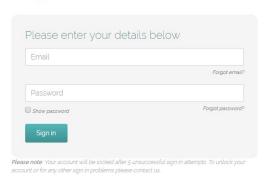
When you first start using the CPD Scheme you will need to register and select a start date when you would like the CPD Log to start. This can be set to today or back dated by up to 11 months. Please note that each year thereafter a new CPD Year will be setup automatically so you will only need to do this once.

## **ACTION**

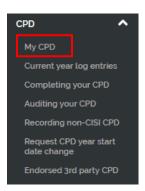
To set up your CPD Year:

1) Sign in to the CISI by entering your registered email and password.

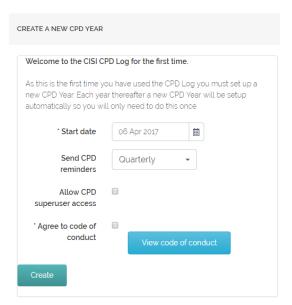
# Sign in to the CISI



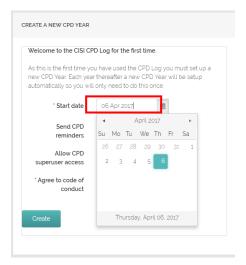
2) Click the 'My CPD' button on the left-hand side of the toolbar.



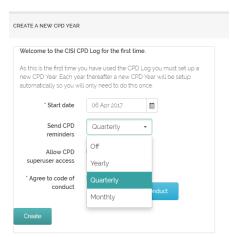
3) This will open the page which will prompt you to select your CPD Start Date as you are using the CISI CPD Scheme for the first time.



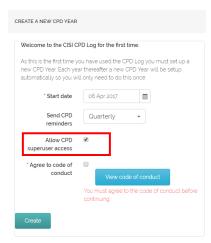
4) Click on the Start Date field and select your CPD Start Date. **Please note:** you can only back date your log up to 11 months.



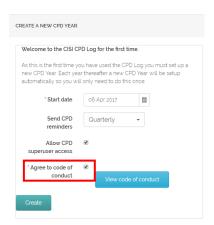
5) Should you wish to set CPD Reminders, please select from the dropdown menu and select either 'Off', 'Yearly', 'Quarterly' or 'Monthly'.



6) If your Firm has a Superuser account there is also the option to allow access so that your firm can view and monitor your CPD records. To do so simply tick the box next to 'Allow CPD Superuser Access'.



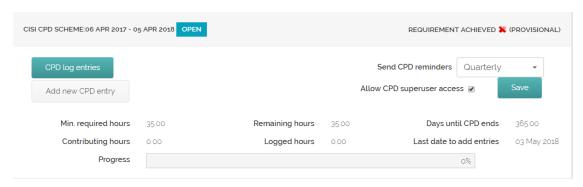
7) Once you are happy with the Start Date, please view the code of conduct and tick the Agree to code of conduct box.



8) To start your CPD Year, please click on 'Create'.



9) Your CPD log will be created.



## 2.2 REQUESTING A DATE CHANGE FOR A CPD YEAR

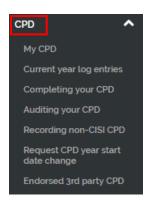
## **BACKGROUND**

On occasions members need to change their CPD year. The CISI recommends that this is done only when absolutely necessary but does recognise that when moving firm, for example, members may need to synchronise their CPD year to meet internal requirements.

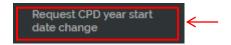
## **ACTION**

To request a date change:

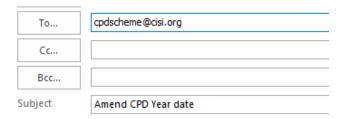
1. Click on the 'CPD' button from the menu on the left-hand side of the page.



2. Click on the link titled 'Request CPD Year Start Date Change'.



3. A new email window will open (using the default email system) with the address and subject fields pre-populated.



Note. For those people who do not use Microsoft Outlook as their default email application, it is necessary to create a new email manually. Please address these to <a href="mailto:cpdscheme@cisi.org">cpdscheme@cisi.org</a>

4. An email should now be completed with exact details of what change is being requested and the reason for this. This should be sent when the information has been created.

## 2.3 REQUESTING CPD REMINDERS FROM THE CISI

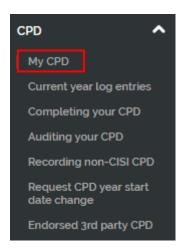
## **BACKGROUND**

It is recommended that CPD users opt to receive occasional reminders from the CISI to keep them on target to meet the annual CPD requirement regarding the progress of their CPD. This includes things such as accumulated hours to date and will helps to keep track of the CPD year progress.

## **ACTION**

To indicate that you wish to receive updates regarding your CPD:

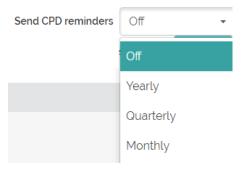
1. Click the 'My CPD' button on the left-hand side of the page. The 'My CPD' screen will open.



2. Locate the correct CPD year which you wish to view. Please note years which are current will have 'Open' written next to them and previous years will have 'Closed' next to them.



3. Next, find the 'Send CPD Reminders' field towards the right-hand side of the page. Where you have the option to set the reminders 'Off', 'Yearly', Quarterly or 'Monthly'.



4. Click on the 'Save' button which can be found on the right-hand side, directly underneath the 'Send CPD Reminders' drop down menu.



Note. To stop receiving updates, select the 'off' option from the drop-down menu to stop reminders. Click the 'Save' button to confirm the action.

## 2.4 ALLOWING SUPERUSER ACCESS TO YOUR CPD LOG

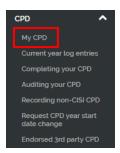
## **BACKGROUND**

There is a setting on each person's CPD Log that enables the Firm Superuser to access it. This topic includes instructions for achieving this.

## **ACTION**

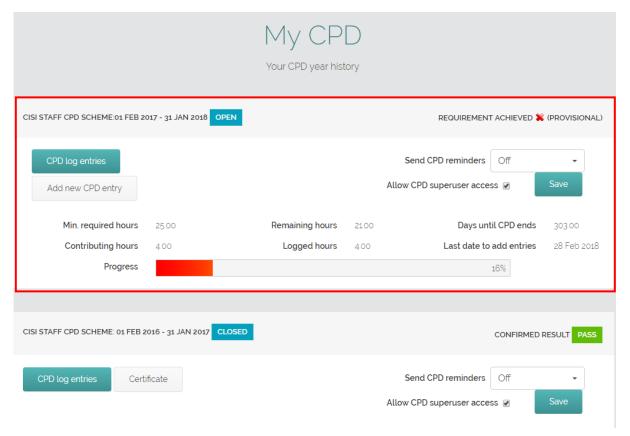
To allow Superuser access, do the following:

Click the 'My CPD' button on the toolbar on the left-hand side of the page. The 'My CPD' screen will open.



## FOR CURRENT CPD YEARS

1. Locate the 'Current CPD Year' this is the first year located at the top of the screen.



2. Next, find the 'Allow Superuser Access' field to the right-hand side of the page. Highlight the tick box associated with this and ensure a 'tick' symbol appears here.



3. Click on the 'Save' button to the right of the field.



Note. To prevent Superuser access to a CPD year, click the ticked 'Allow Superuser Access' field in order to remove the 'tick' symbol. Click the 'Save Settings' button to confirm the action.

## FOR PREVIOUS CPD YEARS

1. Locate the 'Previous CPD Year' these logs will have 'Closed' written next to them.



2. Next, find the 'Allow Superuser Access' field to the right-hand side of the page. Highlight the tick box associated with this and ensure a 'tick' symbol appears here.



3. Click on the 'Save' button to the right of the field.



Note. To prevent Superuser access to a CPD year, click the ticked 'Allow Superuser Access' field to remove the 'tick' symbol. Click the 'Save Settings' button to confirm the action.

## 3.1 ADDING AN ENTRY TO THE CPD LOG

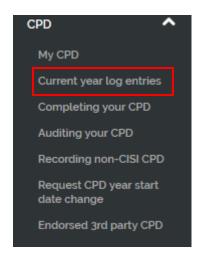
## **BACKGROUND**

Activities undertaken through the CISI will be auto logged within your CPD record. Activities undertaken through external CPD providers will need to be entered manually.

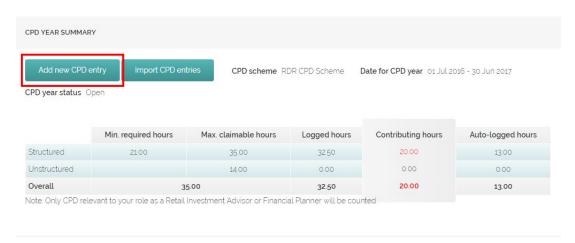
## **ACTION**

To add a new entry to the CPD log, the following steps should be taken:

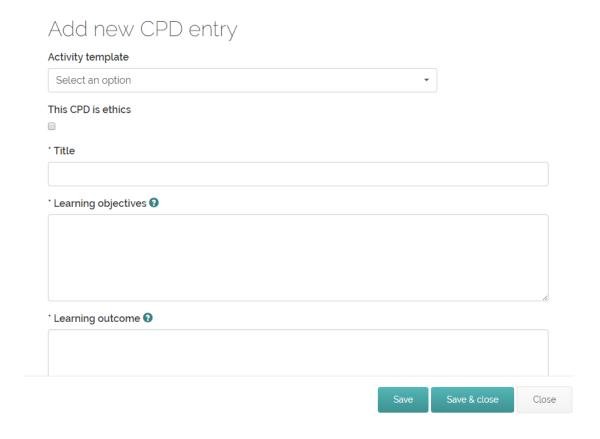
1. Click the 'Current year log entries' button on left hand side of the toolbar. The 'CPD Year Summary' screen will appear.



2. Click on the 'Add New CPD Entry' button.



3. The 'Add new CPD entry' window will open.



## ENTERING THE ACTIVITY DETAIL

1. You have the option to mark whether the activity being logged fulfils the ethics CPD requirement by ticking the 'This CPD is ethics' tick box.



- 2. Click in the 'Title' field and enter a heading for the activity. This will appear in the 'CPD year entries' list. **This is a mandatory field**.
- 3. Click in the 'Learning Objectives' field and enter some text describing what the activity relates to. **This is a mandatory field**.
- 4. Next, click in the 'Learning Outcome' field and describe what you learnt by undertaking the activity. Note. This field does not need to be completed for planned activities but **must** be completed upon completion of the activity for it to be valid. **This is a mandatory field**.
- 5. Now click on the 'Start Date' field and use the calendar to navigate to the date when the activity began. Click this date when found.



- 6. Once you select a 'start date' the same date will automatically appear in the 'end date' field. To change the 'End Date' you will need to click on the calendar. If the activity took place over a couple of days you will need to change the end date.
- 7. Next, select the 'Learning Type' for the activity in the 'Select an Option' field. This is done by clicking on the arrow to the right of the field and then choosing the relevant item from the drop-down list that appears. **This is a mandatory field**.
- 8. Next, select the 'Category' for the activity in the 'Select an option' field. This is done by clicking on the arrow to the right of the field and then choosing the relevant item from the drop-down list that appears. **This is a mandatory field**.
- 9. Next, select the 'Provider' of the activity in the 'Select an option' field. This is done by clicking on the arrow to the right of the field and then choosing the relevant item from the drop-down list that appears. **This is a mandatory field**.
- 10. If relevant, enter a score in the 'Score' field (e.g. for activities where a numerical result is given).

## CPD SCHEME - USER GUIDE

- 11. Click on the '?' to open the CISI guide to learning objectives and outcomes for further guidance on what to include in a learning outcome.
- 12. If relevant, enter a grade in the 'Grade' field (e.g. for activities where a graded result is given).
- 13. Next, in the 'Hours' field enter the total CPD hours being claimed as a decimal (e.g. 1 hour 15 minutes = 1.25). **This is a mandatory field**.
- 14. You can also tick the 'Can audit entry' tick box if you are happy for this entry to be audited should your record be randomly selected for audit.
- 15. Members are encouraged to upload evidence to their CPD Activities. Please note that if you add or remove files these will be uploaded or deleted upon saving the entry.
- 16. Once all the required fields mandatory and optional have been completed, click the **Save** button at the foot of the window to finalise the entry details. Alternatively, click the **Save & Close** button to finalise the entry details and close the window.
  - Note. It is possible to abandon the process at any point by clicking the **Close** button If any changes have been made or information entered, a pop-up will ask if you wish to continue without saving.
- 17. The entry will now appear on the current CPD log (shown on the 'My CPD' page). Once the entry has been saved this will appear in the 'CPD year entries' list.

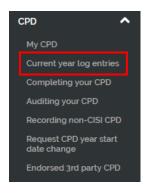
## 3.2 IMPORTING ENTRIES ONTO YOUR CPD LOG

## **BACKGROUND**

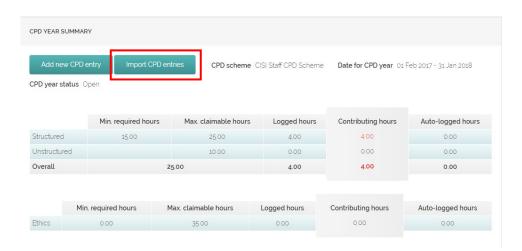
It is possible to import CPD entries by using the Excel Template available and importing these to your CPD Log.

## **ACTION**

1) Click on the 'Current Year Log Entries' button on the left-hand side of the toolbar. The CPD Year summary will appear.



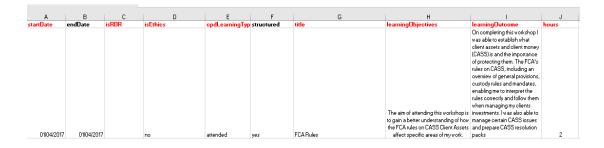
2) Click on the 'Import CPD Entries' button.



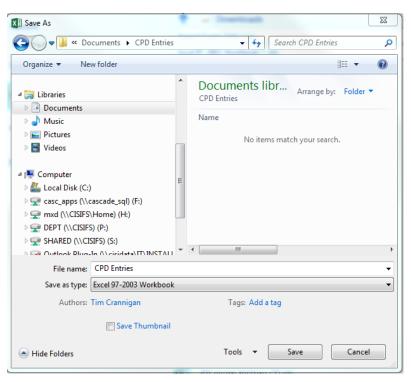
3) The Import CPD entries pop up will open, thereafter click on the 'Download Excel Template' button.



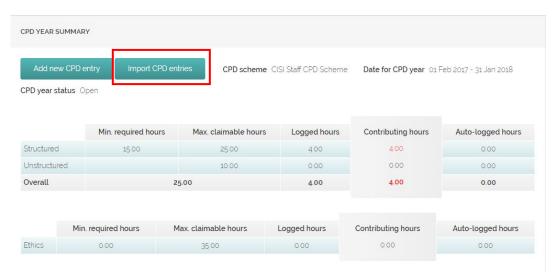
4) Once the Excel Template has download, please fill in the fields listed on the template. **Please note:** columns marked in red are mandatory fields and are required to be filled in. you will also find that some columns have drop down menus.



5) Give the file a suitable name and save the document.



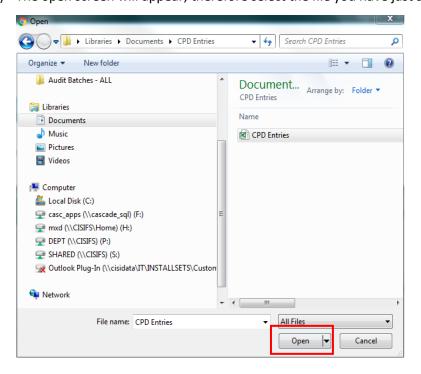
6) Click on the 'Import CPD Entries' button under CPD Year Summary.



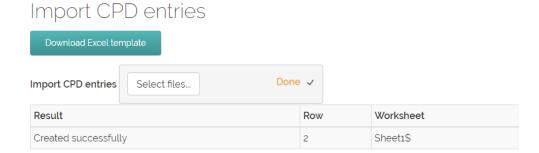
7) Once the Import CPD entries screen appears, please click on 'Select files' next to Import CPD Entries.

# Download Excel template Import CPD entries Select files...

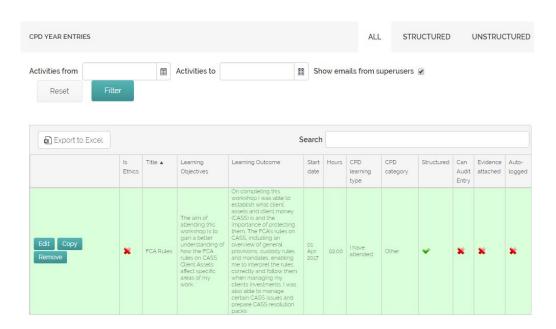
8) The open screen will appear, therefore select the file you have just saved and click open.



9) Once you have selected the file you wish to import, it should read 'Created successfully' under result. This means that the entry(s) have been imported.



- 10) To go back to your CPD Year summary click the **(X)** on the left-hand side of the Import CPD entries box.
- 11) The entry imported will be visible for you to view under CPD year entries.



## Please note:

- You can only add entries to CPD Years which are still open.
- Any CPD which you log must fall between the Start and End date.
- Learning Outcomes and Objectives cannot be less than 30 characters.
- Mandatory fields on the Excel import template **must** be completed.
- You cannot log more than 8 hours per day for an entry.

## 3.3 UPLOADING SUPPORTING EVIDENCE TO A MANUAL ENTRY

## **BACKGROUND**

Supporting evidence can be attached to a manual entry. This can be done at any time and is required if the CISI perform an audit on the selected log. Note that there is a 10MB maximum file size.

Acceptable file types for supporting evidence documents are as follows:

Document type	File type
MS Word	.doc, .docx, .rtf
MS Excel	.xls, .xlsx, .csv
Text	.txt
Images	.jpg, .gif, .png, .bmp, .tif
PDFs	.pdf
MS PowerPoint	.ppt, .pptx
Email	.eml

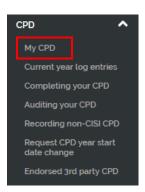
If any other file types that are to be uploaded the CISI must be contacted at <a href="mailto:cpdscheme@cisi.org">cpdscheme@cisi.org</a>.

## **ACTION**

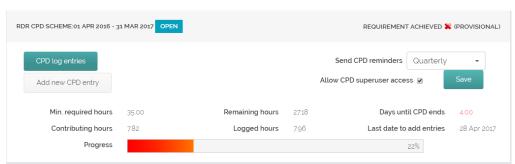
To upload supporting evidence, do the following:

## OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click the 'My CPD' button on the left-hand side of the toolbar. The 'My CPD' screen will open.



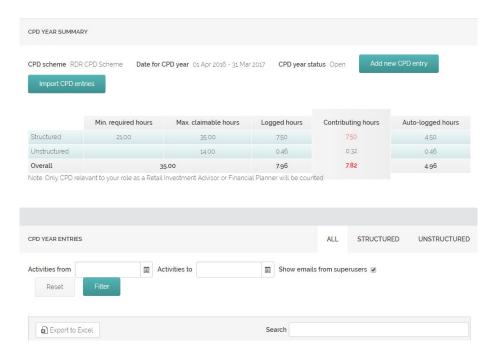
2. Locate the correct CPD year which you wish to view. Please note years which are current will have 'Open' written next to them and previous years will have 'Closed' next to them. Note: you may only add entries to years which are 'open'.



3. Click on the 'CPD Log Entries' button.

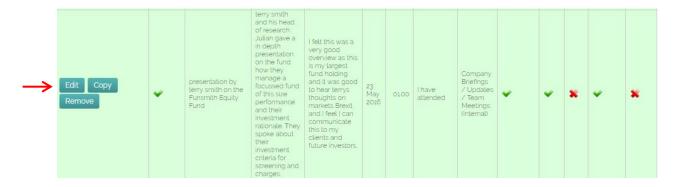


4. The 'CISI CPD Log Entries' page will open.



## **OPEN THE ENTRY & ADD EVIDENCE**

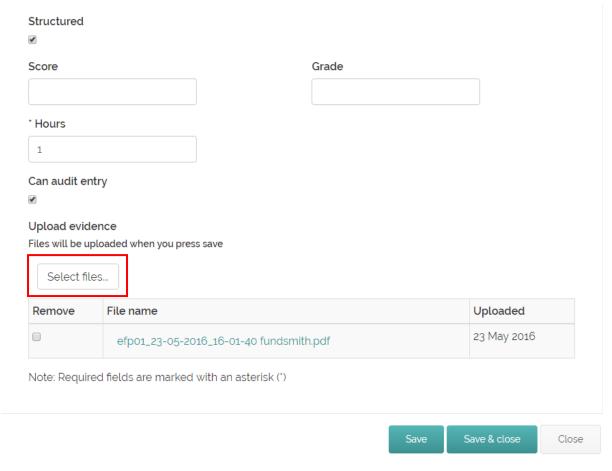
1. Locate the entry that is to be edited in the list.



2. Click on the 'Edit' button on the left-hand side of the entry.



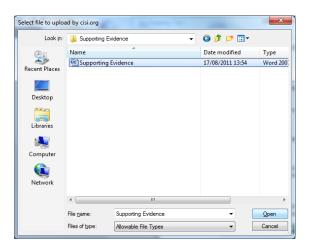
3. The 'Edit Activity' window will appear. To upload evidence, scroll down to the 'Upload Evidence' section and click on 'Select files'.



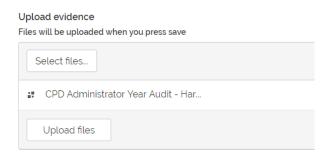
4. Click on the 'Select Files' button in the 'Upload Evidence' field.



5. A pop-up browser will appear. Use this to navigate to the folder where the document is located and highlight it. Click 'Open' to confirm the selection.



6. The 'Upload Evidence' field will reflect that evidence has been attached.



7. Click the 'Save' or 'Save & Close' button to complete the process. The document will now be uploaded and appear as an existing item.



Note. If there are any issues with uploading evidence, please contact your own IT department in the first instance to see if there are any internal firewalls or other software in place preventing files from being uploaded. If this does not resolve the issue please contact the CISI at <a href="mailto:cpdscheme@cisi.org">cpdscheme@cisi.org</a>.

Note. To remove a supporting evidence file, tick the 'remove' button to the left side of the entry and press either 'Save' or 'Save & Close'.

## 3.4 EDITING AN EXISTING MANUAL ENTRY ON THE CPD SCHEME

## **BACKGROUND**

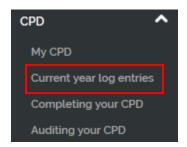
It will sometimes be necessary to amend the details of an existing, manually-added entry saved in your log. It is only possible to edit entries in a current CPD year.

## **ACTION**

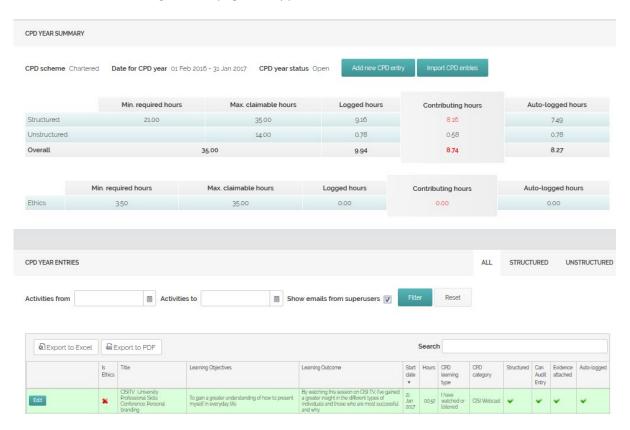
To edit an existing entry:

## OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click the 'Current year log entries' button on the left-hand side of the page. Your current CPD year will be available for you to edit and view.



2. The 'CISI CPD Log Entries' page will appear.



## **EDIT THE ENTRY**

1. Locate the entry that is to be edited in the 'CPD year entries' list found at the lower part of the page.



2. Click on the 'Edit' button to the left-hand side of the entry.



3. The 'Edit CPD entry' window will appear.

## Edit CPD entry \* Title Presenting at a meeting \* Learning objectives 🗆 The objective is to develop others' understanding and ability in the area of portfolio construction and enable me to enhance and maintain my own professional competence. \* Learning outcome 🗆 Presenting at this meeting, I was able to develop others' understanding of portfolio construction, covering appropriate asset allocation, portfolio weightings and diversification. On receiving feedback from attendees, I was also able to build on my knowledge in these areas and take back new effective techniques to enhance my role. Start date End date 21 Mar 2017 21 Mar 2017 iii Save & close Close

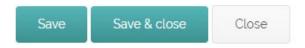
- 4. Next, amend the relevant fields as necessary. To do this, click in the field and:
  - For text fields, manually change the data
  - For date fields, click on the field and use the calendar to navigate to and highlight the desired date
  - For 'option' fields (e.g. 'Learning Type'), click on the field & highlight the option Remember that fields marked with an asterisk (\*) are mandatory & must contain some data.
- 5. Evidence to support the activity can be attached to the entry via the 'Upload Evidence' field. Click on the 'Select Files' button and locate and highlight the desired document. Click 'Open' to complete the upload within the 'file upload' pop up. Click 'Open' to complete the upload.

Acceptable file types for supporting evidence documents are as follows:

Document type	File type
MS Word	.doc, .docx, .rtf
MS Excel	.xls, .xlsx, .csv
Images	.jpg, .gif, .png, .bmp, .tif , jpeg, tiff
PDFs	.pdf
PowerPoint	.ppt, .pptx
Email	.eml, msg

Note. There is a 10MB file size maximum limit for these files.

6. Next, save the amendments by clicking the 'Save' button (or 'Save & Close' to return to the previous screen). Click 'Close' to exit without saving.



## 3.5 EDITING AN EXISTING CISI AUTO-LOGGED ENTRY ON THE CPD SCHEME

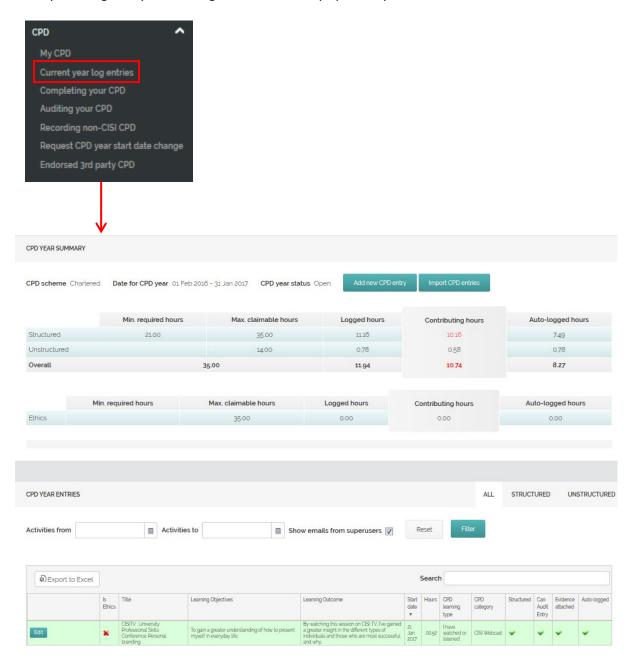
## **BACKGROUND**

It will sometimes be necessary to amend the details of an existing, automatically-added entry on a CPD Log. This differs from the editing of a manually-added entry as not ALL fields can be amended. It is also only possible to edit entries on a current CPD year.

## **ACTION**

## OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click on the 'Current year log entries' tab on the left-hand side of the page, which will take you straight to your CPD log which is currently open for you to view and edit.



## **EDIT THE ENTRY**

2. Locate the entry that is to be edited in the list at the bottom of the page.



3. Click on the 'Edit' button to the left-hand side of the entry.



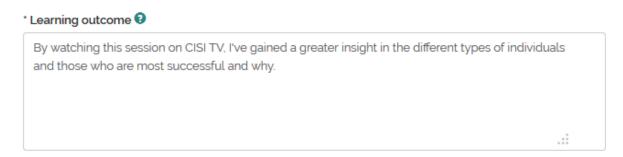
4. The 'Edit Activity' window will appear.

# Some fields are locked for the following reasons • This entry was added automatically by the CISI • Some fields are locked since this cpd entry has been submitted for gap-fill auditing or was approved This CPD is ethics • Title CISITV: University Professional Skills Conference: Personal branding • Learning objectives • To gain a greater understanding of how to present myself in everyday life.

Close

## CPD SCHEME – USER GUIDE

5. Enter detail in the 'Outcome' field (i.e. what was learned from undertaking the activity).



6. Next, save the amendments by clicking the 'Save' button (or 'Save & Close' to return to the previous screen). Click 'Close' to exit without saving.



## 3.6 COPYING AN EXISTING ENTRY

## **BACKGROUND**

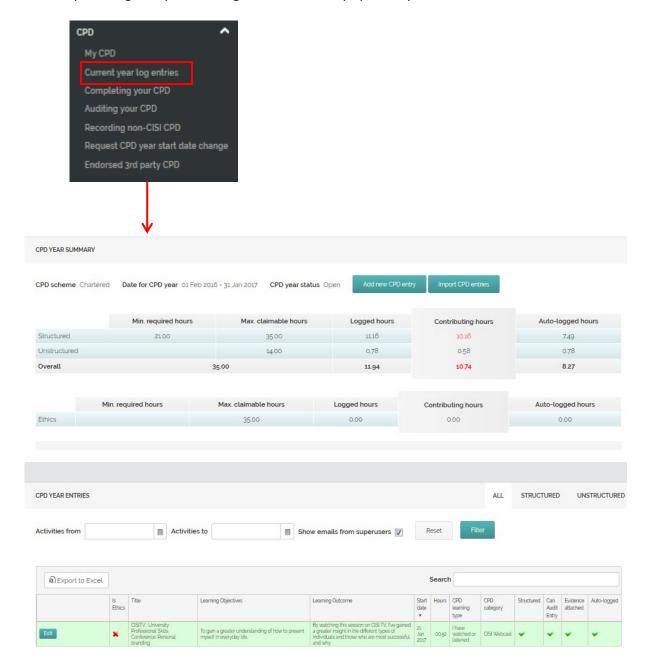
An existing entry can be copied and used as a template for a new entry activity. Please note that it is **not** possible to copy any CISI auto-logged activities.

## **ACTION**

To copy an existing entry and create a new one from it:

## OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click on the 'Current year log entries' tab on the left-hand side of the page, which will take you straight to your CPD log which is currently open for you to view and edit.



## **COPY THE ENTRY**

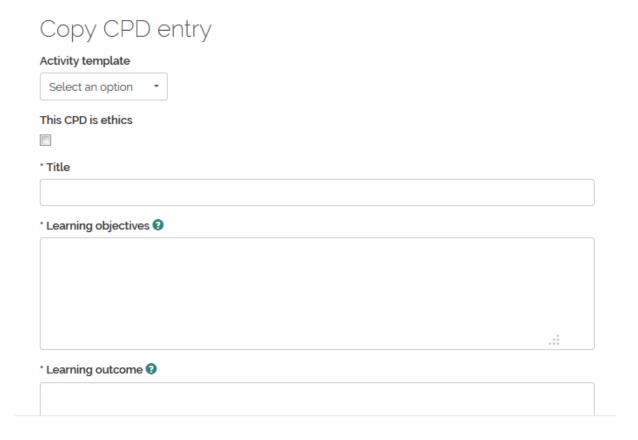
1. Locate the entry that is to be copied in the list of existing entries at the foot of the page.



2. Click on the 'Copy' button situated to the left of the entry.



3. The 'Copy CPD Entry' window will open showing full details for the entry.



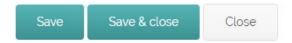
- 4. Now alter whichever fields need to be amended. To do this, click in the field and:
  - For text fields, manually change the data
  - For date fields, click on the field and use the calendar to navigate to and highlight the desired date
  - For 'option' fields (e.g. 'Learning Type'), click on the field & highlight the option

Remember that fields marked with an asterisk (\*) are mandatory & must contain some data.

## CPD SCHEME – USER GUIDE

Note. Evidence that has been uploaded on the original activity entry **will NOT be copied** to the new one.

5. Next, save the amendments by clicking the 'Save' button (or 'Save & Close' to return to the previous screen). Click 'Close' to exit without saving.



6. The newly created entry will appear in the list of existing CPD entries, in addition to the original.

#### 3.7 REMOVING AN ENTRY FROM CURRENT CPD YEAR

## **BACKGROUND**

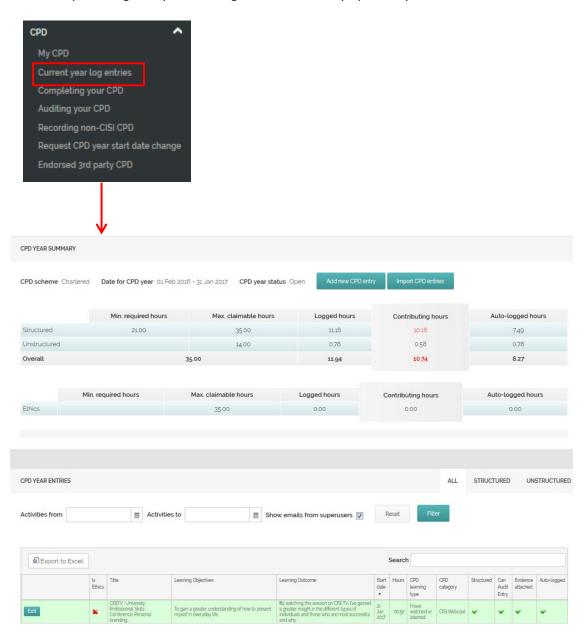
It is possible to remove a **manual** entry from the current CPD year. This process is covered in this topic. It is not possible, however, to remove an entry that has been auto-logged by the CISI. If an entry of this type needs to be removed, please email <a href="mailto:cpdscheme@cisi.org">cpdscheme@cisi.org</a> detailing the reason why.

## **ACTION**

To remove a manual entry from the current CPD year:

# OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click on the 'Current year log entries' tab on the left-hand side of the page, which will take you straight to your CPD log which is currently open for you to view and edit.



# REMOVE THE ENTRY

1. Locate the entry that is to be removed in the list at the bottom of the page.



2. Click on the 'Remove' button to the left-hand side of the entry.



#### **4.1 VIEWING CPD LOG ENTRIES**

## **BACKGROUND**

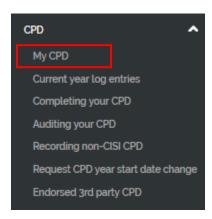
It is possible to view a list of existing entries for activities on a selected CPD Log. Each entry is shown with the following fields: 'Title', 'Learning Objectives', 'Learning', 'Outcome', 'Start Date', 'Hours', 'CPD Category', 'Structured', 'CPD Learning Type', 'I Can Audit Entry', 'Evidence Attached' and 'Autologged'. Additionally, there are options to Edit, Copy and Remove entries (as appropriate).

## **ACTION**

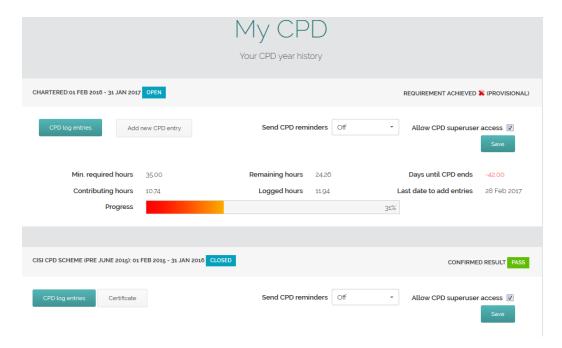
To view the entries for a selected CPD Log:

## **SELECT A CPD YEAR**

1. Click the 'My CPD' button on the left-hand side of the page. The 'My CPD' screen will open.

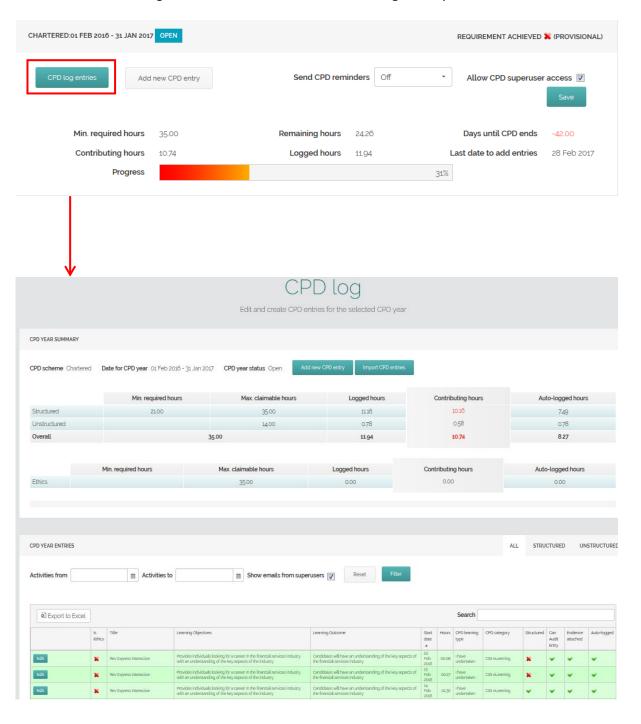


2. The 'My CPD' Screen will display a list of all CPD years that have been completed to date. The current year will be displayed at the top, reading 'Open' and all other CPD years which have been closed will be displayed beneath the current CPD Year.



## CPD SCHEME - USER GUIDE

3. Click on 'CPD log entries' on the left-hand side of the log which you which to view.



#### 4.2 FILTERING ENTRIES DISPLAYED IN A CPD YEAR

#### **BACKGROUND**

There are tools provided which allow for the list of entries displayed in the selected CPD Year to be filtered. This can be done using three different methods, which are:

- a) by entering a date range to show only those entries logged within this period
- b) by selecting a specific element to show only those entries logged under this
- c) by entering keywords in 'Search' to show only those entries that contain matching information

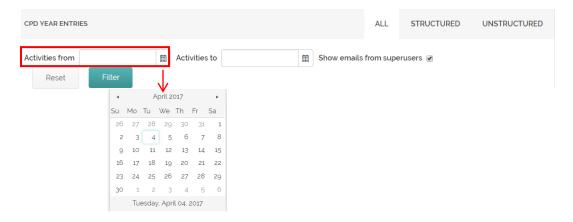
Additionally, a combination of these tools can be used to further refine which entries are displayed. For instance it is possible to filter the entries by a date range AND include search keywords as well.

#### ACTION

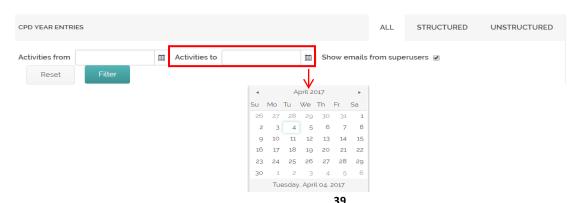
To filter CPD Log entries, first open the 'CISI CPD Log Entries' page for the relevant year and then follow the steps below for the appropriate method:

#### FILTER BY DATE RANGE

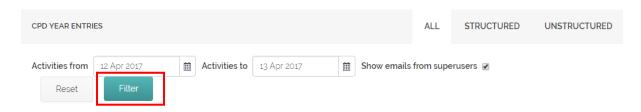
1. Click in the Activity From field and use the calendar to navigate to the date from which entries are to be included in the results. Highlight this date when found.



2. Click in the 'Activity To' field and use the calendar to navigate to the end date for logged entries that are to be included in the results. Highlight this date when found.

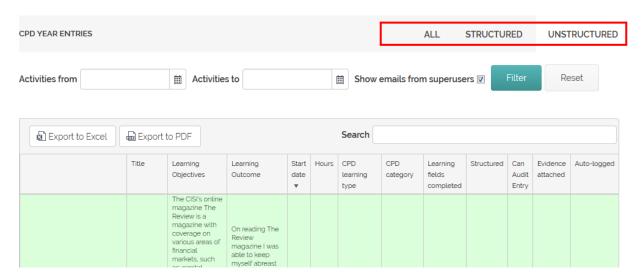


3. With the date range now set, click the 'Filter' button below the date fields. The entries will be filtered and displayed accordingly.

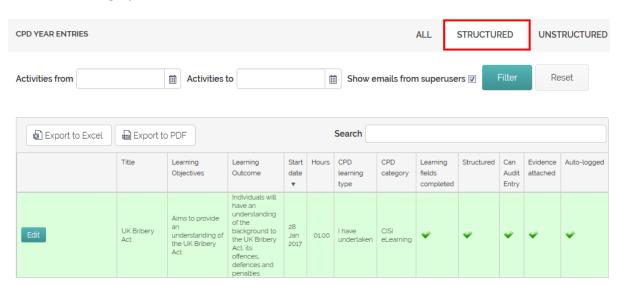


## FILTER BY ELEMENT

1. Locate the element tabs that are found above the list of existing activity entries.



2. Click on the relevant tab to filter the list of entries so that only those entries associated with the selected element are shown. For example, to include entries that are logged for the 'Structured' category alone, click on the tab marked 'Structured'.



# FILTER BY KEYWORD(S)

1. Click in the 'Search' field immediately above the list of entries.



2. Type the keyword or phrase upon which the filter will take place. As the information is entered the system will attempt to find any matching entries in real-time and filter the results list accordingly.



Note. The search will be performed across ALL fields (not just the 'Title' and 'Description').

# **RESETTING THE FILTER**

(Reset the filter and include ALL existing entries for the current CPD year in the results list)

3. Click on the 'Reset' button located immediately above the results list.



4. Any existing filters will be removed and the entries list will update to include ALL existing items.

#### 4.3 VIEWING SUPERUSER EMAILS IN A CPD YEAR

## **BACKGROUND**

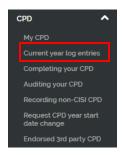
Sometimes emails will be sent from the CPD Superuser system and it is possible to include a view of these on a selected CPD Log.

## **ACTION**

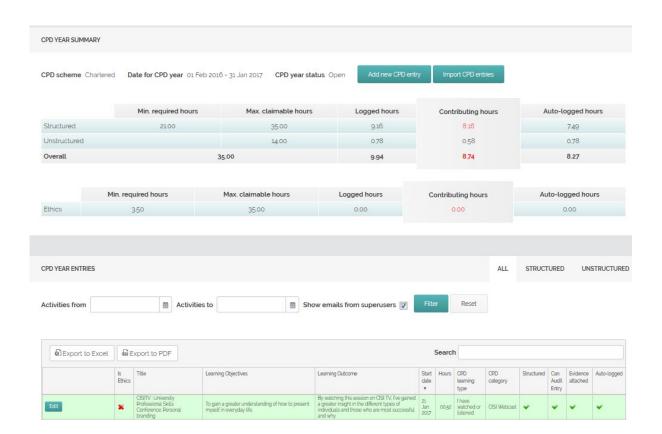
To include a view of Superuser emails, follow the steps below:

## OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click the 'Current year log entries' button on the left-hand side of the page. Your current CPD year will be available for you to view and edit.

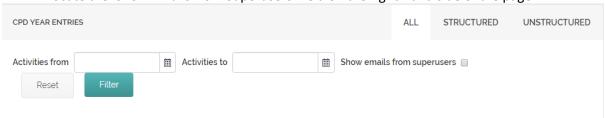


2. The 'CISI CPD Log Entries' page will open.

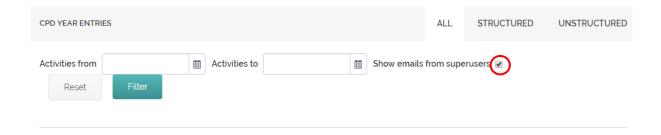


# SUPERUSER EMAIL SETTING

1. Locate the 'Show Emails from Superusers' field on the right-hand side of the page.



2. Highlight the box to the right of the field so that a 'tick' symbol appears.



#### 4.4 VIEWING CERTIFICATES FOR PREVIOUS CPD YEARS

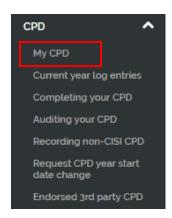
## **BACKGROUND**

It is possible to view a certificate awarded for the successful completion of a specific CPD year. The certificate can also be printed. Please note that this option is only available to those who have passed the CPD year in question.

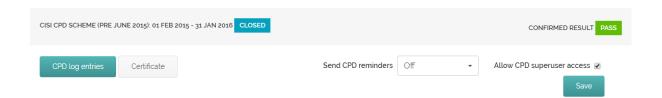
## **ACTION**

To view a certificate from a previous CPD log, the following steps should be undertaken:

1. Open the 'My CPD' screen by clicking the corresponding button on the menu bar.



2. Locate the previous CPD Year for which you wish to download the Certificate for, these CPD years will have closed written next to them.



1. Click on the **Certificate** button. The certificate will open in a new window.



## **5.1 EXPORTING ACTIVITIES TO EXCEL**

## **BACKGROUND**

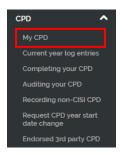
Activity entries for a selected CPD year can be exported to a file and opened using Excel to view the information in spreadsheet form.

## **ACTION**

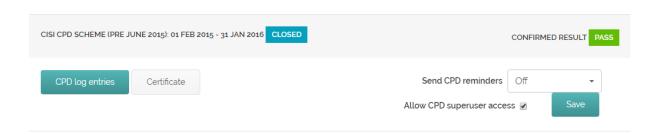
To export activity entries to Excel, the following steps should be taken:

## OPEN THE RELEVANT CPD LOG ENTRIES PAGE

1. Click the 'My CPD' button on the toolbar towards the right-hand side of the page. The 'My CPD' screen will open.



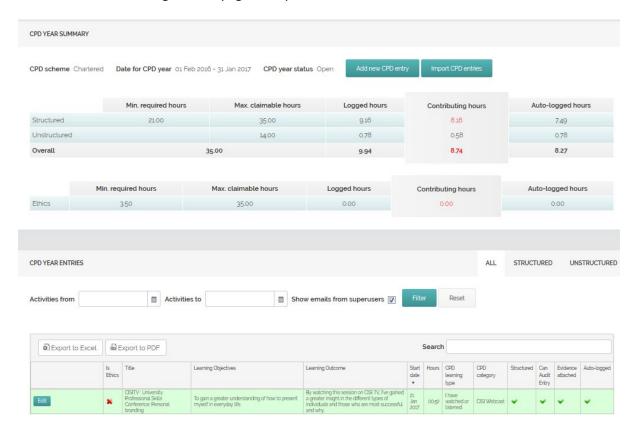
2. Locate the correct CPD year which you wish to view. Please note years which are current will have 'Open' written next to them and previous years will have 'Closed' next to them.



3. Click on the 'CPD Log Entries' button.



4. The 'CISI CPD Log Entries' page will open.

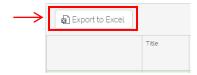


# **EXPORT ACTIVITIES**

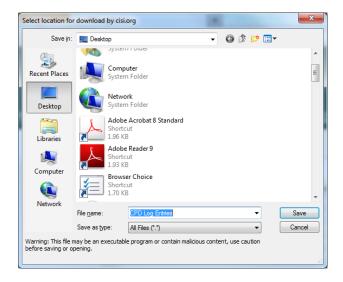
1. Locate the 'Export to Excel' button which will be found on the top left-hand corner under CPD Year Entries.



2. Click on the 'Export to Excel' button on the top-left of grid.



3. A browser window will appear in which the destination folder for the file can be selected and the file name altered (the default is 'CPD Entries'). If altered, the file name must have .xls or .xlsx (as appropriate) appended to the end of it (e.g. 'Log Export.xls' must be entered). Click the 'Save' button to complete the process or 'Cancel' to abandon the save.



4. The file can now be opened and the activities viewed in spreadsheet format.

## **HOW TO DECLARE YOUR CPD**

# **BACKGROUND**

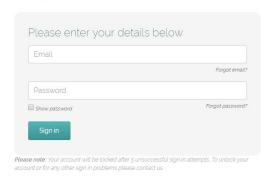
Once you have undertaken your CPD activities for the year, you will be required to self-declare your CPD records within the CISI CPD Scheme.

# **ACTION**

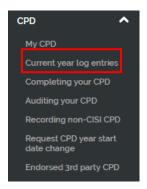
To declare your CPD:

1) Sign in to the CISI by entering your registered email and password.

# Sign in to the CISI



2) Click the 'Current year log entries' button on the left-hand side of the toolbar.



3) To declare your CPD you will be required to tick the declaration box to confirm that you have completed 10 hours of CPD with a minimum of six hours structured, including one hour in Ethics.



4) Click the 'Submit' button.



5) A pop up box will appear to confirm that your CPD records have been submitted.

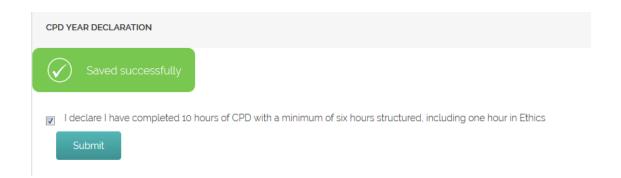
Your CPD has now been submitted



6) Click the 'OK' button.



7) You log will now show that your records have been saved successfully.



**Please note:** If you have self-declared your CPD records and need to add any additional CPD to your log you will still be able to do so as normal by following the steps outlined in section 3.1 of this help guide. **Please remember to submit your CPD records again if you have added any additional entries to your log.** 

## 6.1 LOGGING OUT OF THE CPD LOG

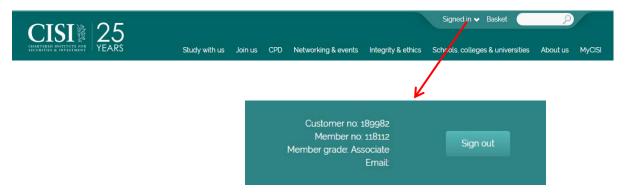
## **BACKGROUND**

This topic details the way in which a person logs out of the CPD Log system once all necessary work has been completed. This will end the session and prevent anyone else from viewing or using the system under the original login credentials.

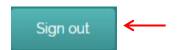
#### **ACTION**

To log out of the CPD Log, complete the steps below:

1. Locate the information area that is presented at the top of any screen within the system. This area includes the name of the person who is currently logged in, along with Customer and Membership numbers where appropriate.



2. Click on the 'Sign out' button.



3. The log out process will now be completed and the system will direct the user to the CISI website homepage. From here it is possible to log into the CPD Log using the 'Login' option. By hovering over the tab and clicking 'log in' to view your CPD record.

