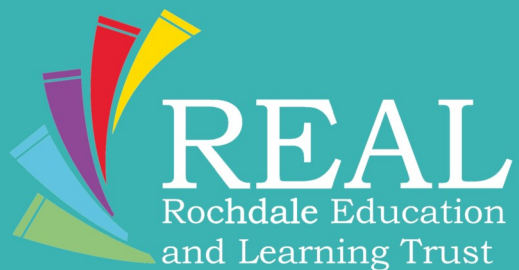


CPD Coordinator User Guide



Introduction to the new website

The REAL Trust has upgraded the website, the majority of the features of the previous website are still available along with some new features such as:

- ✓ Notification systems for delegates booked on courses
- ✓ Pre/post course resources automatically generated and sent to delegates
- ✓ Easier communication systems with delegates
- ✓ Social media integration
- ✓ Email marketing integration
- ✓ Responsive design which makes managing bookings easier from mobile/tablet devices
- ✓ And integrated Google Maps functions to find venues easier

In this guide you will find information on the following:

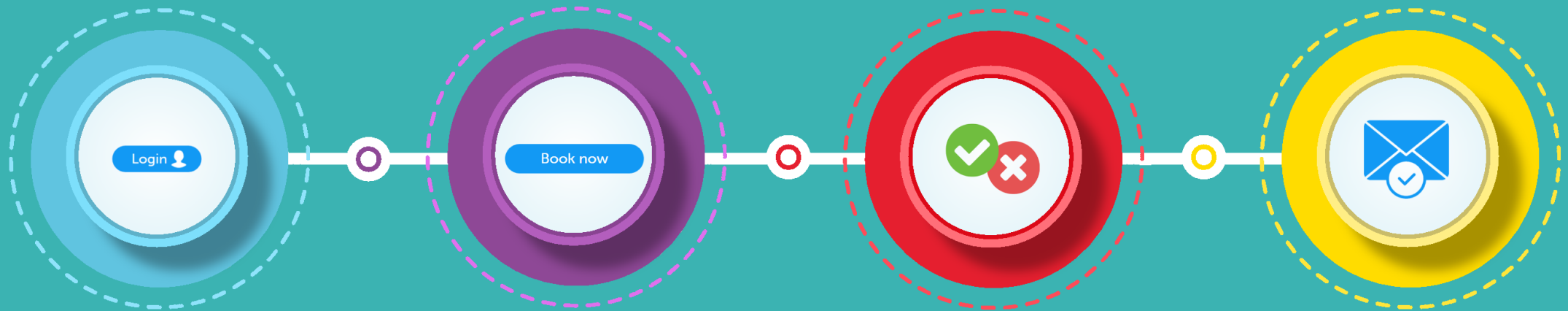
- ✓ Activating an account for a staff member
- ✓ Booking a member of staff on a course
- ✓ Approving a course request
- ✓ Cancelling a course



What is the role of the CPD Coordinator?

On the REAL Trust website the CPD Coordinator has overall responsibility for the administration of the online booking system. The role includes maintaining the following:

- ✓ Adding/removing new/old staff accounts for the school
- ✓ Accepting/declining bookings from staff members when new requests come through
 - ✓ Enrolling staff on training courses
- ✓ Cancelling courses where staff will not be able to attend



Step 1

Staff logs in to account using their provided username and password

Step 2

Staff browses courses and finds a course they would like to attend, clicks **Book now** and saves the booking

Step 3

CPD Coordinator recieved an email notification with the course request, logs on the the system and **Accepts** or **Declines** the course request

Step 4

Staff member recieves notification. If the request has been accepted the member of staff will recieve an email with all the details and a reminder prior to the course

Follow us on social media for all the latest news, and
course announcements



@REALRochdale



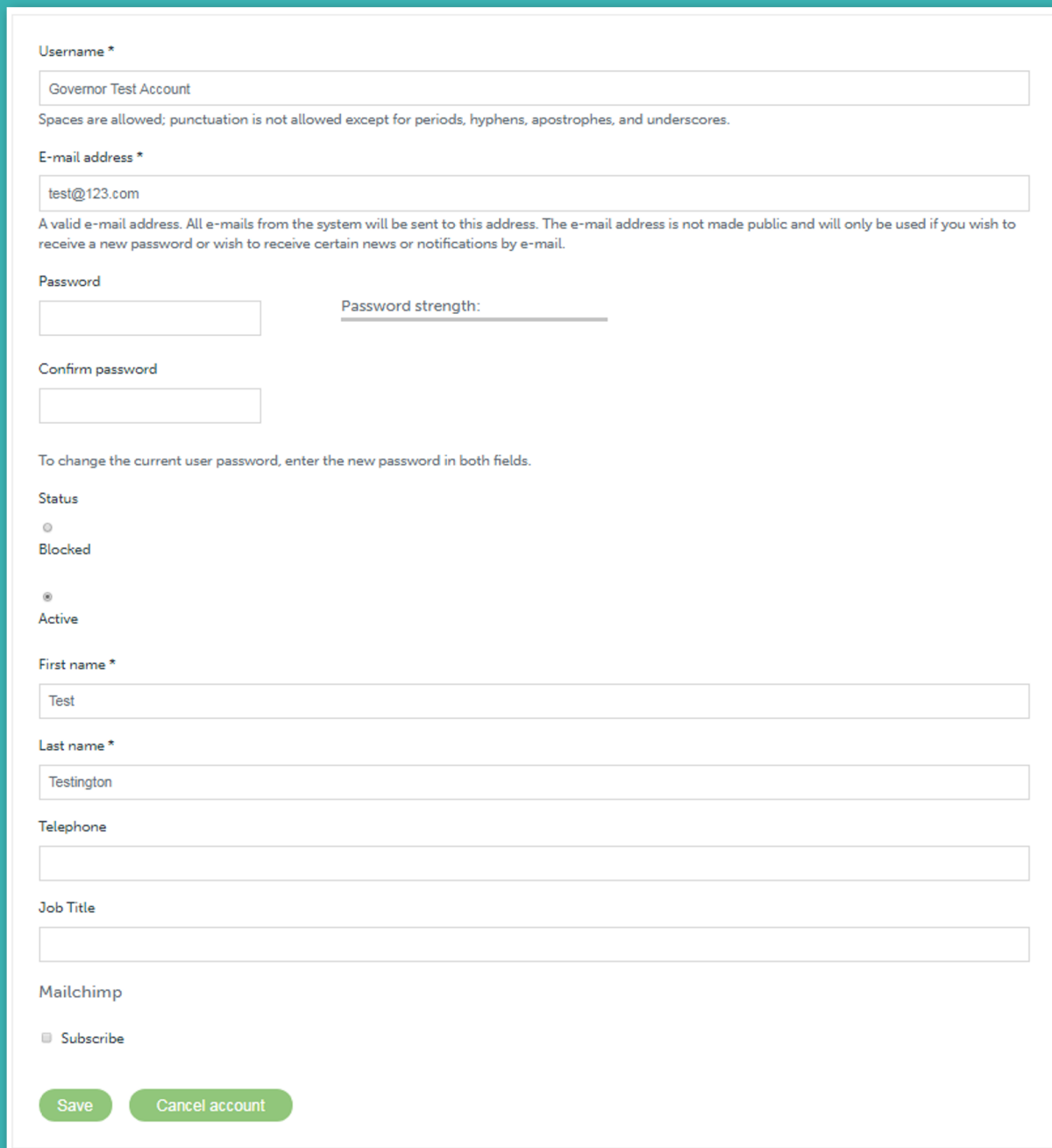
@RochdaleLearning

Activating an account for a staff member

As a CPD coordinator it is one of your roles to add staff on to the system in order for you to book them on to a course. To make this easier you can ask the staff member to go on to the website and fill in the registration form, or you can do this yourself - for more information on doing this please see the **Staff User Guide**.

Once this has been done you will have to follow the following procedures:

- ✓ Log in to your account, you will be directed straight to your Dashboard
- ✓ From the Dashboard click on the **Staff tab**
- ✓ Find the member of staff who have just registered and **click on their name**
- ✓ Click **Edit**
- ✓ From here you will see the screen to the right, you will have to click **Activate (see right) and click Save**
- ✓ The staff member will now receive and email with a One-time Passcode inviting them to create a password



The screenshot shows a registration form for a staff member. The form is titled 'Username *' and contains the following fields and options:

- Username ***: A text input field containing 'Governor Test Account'. Below it, a note states: 'Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.'
- E-mail address ***: A text input field containing 'test@123.com'. Below it, a note states: 'A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.'
- Password**: A text input field.
- Confirm password**: A text input field.
- Password strength:**: A progress bar indicating the strength of the password.
- Status**: Two radio button options: 'Blocked' (selected) and 'Active'.
- First name ***: A text input field containing 'Test'.
- Last name ***: A text input field containing 'Testington'.
- Telephone**: A text input field.
- Job Title**: A text input field.
- Mailchimp**: A checkbox labeled 'Subscribe'.
- Buttons**: Two green buttons at the bottom: 'Save' and 'Cancel account'.

Booking a member of staff on a course

To book a member of staff on to a course you can follow the steps below:

- ✓ Find the desired course from your CPD account and click on **Book now.**
- ✓ From here you will see the screen to the right which is a little different to a staff account, you can select any member of staff within your school by clicking the dropdown box and click **Save registration.**
- ✓ Confirmations and reminders will be sent to the staff account as normal

The screenshot shows the 'Appraisal Training' page on the Rochdale Education & Learning Trust website. The page has a purple header with the title 'Appraisal Training' and a black bar below it with 'View' and 'Register' links. The main content area is white and contains a form for selecting a user. The form has a label 'User' above a dropdown menu that currently shows '-Select a teacher'. A red circle highlights the dropdown arrow. Below the dropdown are two buttons: 'Save Registration' (green) and 'Cancel' (blue). At the bottom of the page is a green banner with the text 'Bespoke Training Courses' and 'Register your school today'.

Rochdale Education & Learning Trust

Home Membership Resources About Contact Help Find a course My Account

Appraisal Training

View Register

User

-Select a teacher

Save Registration Cancel

Bespoke Training Courses

Register your school today

This is your Dashboard

The Dashboard will usually be the first page you see when you log in. If you want to access it after you have browsed the website you can access this by clicking **My Account** and **Dashboard**.

From the Dashboard you can see three separate boxes.

- ✓ The first box are the courses you have enrolled on yourself
- ✓ The second box are course requests from your staff members
- ✓ The last box are the recent courses your staff have attended.

As you can see by the picture to the right you can **Cancel** any courses from here and also **Accept** or **Decline** any new course requests from staff.

My Upcoming Courses

[Dashboard](#) [Staff](#) [Profile Settings](#)

My Upcoming Courses

Adventures in Learning: Supporting great classroom experiences - for TAs	Tuesday, September 12, 2017 - 09:00	Norton Grange Hotel	View Details	Cancel
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Your School's Course Requests

<div>Enrolled 19 Jul 17</div>	Primary NQT Welcome Event 2017	• Norton Grange Hotel • Pending	Accept	Decline	View Details
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Your School's Course Attendance

Governor Luke S...	Pediatric First Aid	Wednesday, June 7, 2017 - 16:00	• Hopwood Hall College • Accepted	View details
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www.realtrust.org.uk