

CPD Online

Getting Started: Manager Mode

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Introduction

CPDOnline is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through CPDOnline, you have access to classes and courses, training schedules and details about traditional learning events, as well as access to performance support and knowledge documents.

In this document, you will learn how to use CPDOnline for managing training and tracking skills for performance management in Manager mode. You will not learn everything about CPDOnline—just enough to get comfortable navigating and exploring some key features and capabilities.

Logging on to CPDOnline

The first time you access the Log On page, the system will ask you to enter the username and password that have been assigned to you.

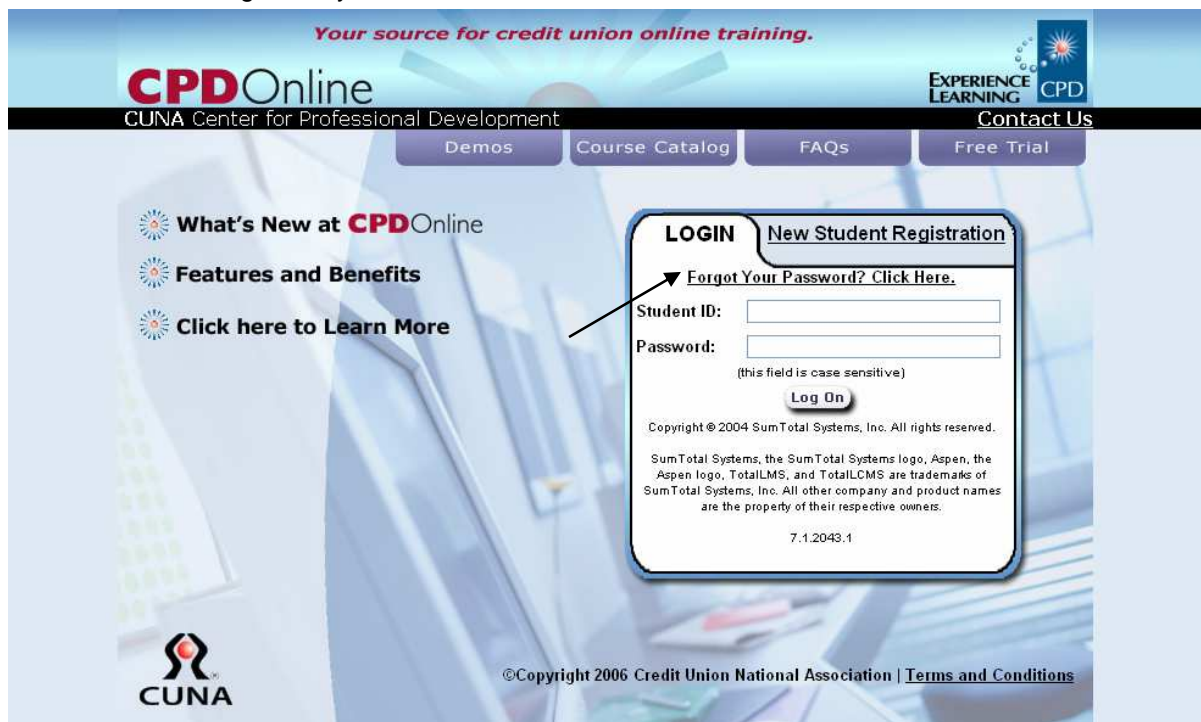






Figure 1: Log On page

The password can be changed after you have successfully logged in to the system. If you forget your password, click on the link **Forgot your Password? Click Here.**

About User Modes

Depending on your role in CPDOnline (manager, employee, and so forth) you may be able to access pages that appear in different modes. Each mode provides features for specific roles, such as the ability to publish training to the system or to manage employee information. If you have permission to access features in more than one mode, you can switch between these modes by choosing one of the mode buttons at the top of each CPDOnline page. All of the modes are described below.

Mode name	Icon
Learner mode: Provides access to the training material and skills data that is assigned to you. All CPDOnline users can access this mode.	
Manager mode: Provides information about training and performance management for the users a manager is allowed to view. Reports are available for individuals and workgroups.	
Report Manager: Allows administrators to process existing reports or create their own using this report query tool. All results can be presented in a variety of formats and can be exported to Excel.	
Administrator mode: Allows users to create, manage, and configure all components that are tracked by CPDOnline. Employees with permissions to publish training to the site use the Administrator mode to make this training available.	

About the Search Feature

You can enter words in the Search text box available on any page or select from multiple search criteria using the Advanced button. When you enter search items, these rules apply:

- Searches are not case sensitive.
- Exact matches for the word or words you enter in the Search box will appear in the search results.
- If you use a space between words in the Search box, the results will include all records that contain both search words.
- You can use an asterisk (*) as a wildcard character to substitute for zero or more characters.
- Punctuation marks and common short words (or "noise" words) are ignored when used as search criteria. Examples of common short include "and", "or", "the", "as", "after", and "much".




The following table shows some examples of searches including sample results.

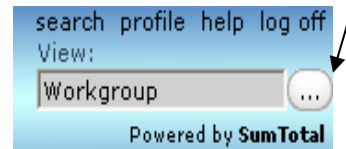
Search using...	Example of search text	Search results
A single word	Register	Returns all records that contain the word register. Does not return records that contain variations of this word, such as registering.
Multiple words	Class List	Returns all records that contain both "class" and "list" in any order or position. Does not return records that contain only one of these words or variations of the words. An example of a search result could be "The resource list for the Finance Fundamentals class ".
A phrase in quotes	"Class Registration"	Returns all records that contain this exact phrase in the searched content. An example of a search result could be "The Accounting II class registration will be held on January 5".
Single search word with an asterisk wildcard character	class*	Returns all records that contain terms that begin with "class" such as classroom or classes .
Multiple search words with wildcard characters	class* acc*	Returns all records that contain both the terms that begin with "class" and "acc". Examples of results: " Accident Reporting Classes " and "The available classrooms for Accounting ".


Viewing Individual Users or a Workgroup

In Manager mode, you can work with an entire workgroup or the individuals in a workgroup. Workgroup view is used for tasks such as group competency assessments and development plans. Switch between workgroup view and individual view by using the Change button.


► **To choose an individual to view:**

1. Next to the View box at the top of the page, click change icon  (under the Log Off link).
2. Select a user.
3. Click  or .
4. In Manager mode, click [Select another user or your workgroup](#) from Getting Started box. Note that this path does not allow access to direct report hierarchy. To move through the hierarchy, you will want to follow path indicated in #1 above.





When viewing an individual user, Manager mode behaves much like Learner mode. An administrator will have access to all individuals within the credit union. Managers can see their direct report hierarchy through the drill down feature shown here. Select 'Workgroup of all direct reports' and click on the drill down link .

Home

Search: [Help](#) 

Workgroup of all viewable users Workgroup of all direct reports

	User Name	User Number	Records: 4 Drill Down
<input type="radio"/>	Connie Boekholder	*****	
<input type="radio"/>	James Carrick	*****	
<input type="radio"/>	Marlo Foltz	*****	...
<input type="radio"/>	Angela Prestil	*****	

Drill Down Link

Figure 2: Select User screen

Using Development Plans to Map Professional Growth

A development plan can help you to:

- Establish [goals](#) and activities for professional development.
- Establish time frames and actions for addressing the specified goals.
- Track and report progress for goals and activities.

Each goal in a development plan may have assigned activities that contribute to the achievement of the goal.

Features of Development Plan



You can create your own individual development plan or use a group plan assigned by your manager using the Development Plans page. Depending on your permissions, some of the features on your Development Plans page may include the items below. Use the CPDOnline Help to learn more about these features:

- *Create, delete, and update plans.* Development plans are powerful tools if they are relevant and up-to-date. Keep your development plans current by updating them to reflect goals.
- *Assign a plan to participants.*
- *Change the status of a plan.* You can activate or deactivate a plan.
- *Print a plan.* If you prefer to review details in a hard copy format, you can print a development plan.
- *Export data.* You can review a plan offline by exporting it to Microsoft Excel.

Creating an individual and group development plans

You can access individual or group development plans. If you want to view an individual development plan for someone you manage, choose the individual employee view.


To create a new individual or group development plan:

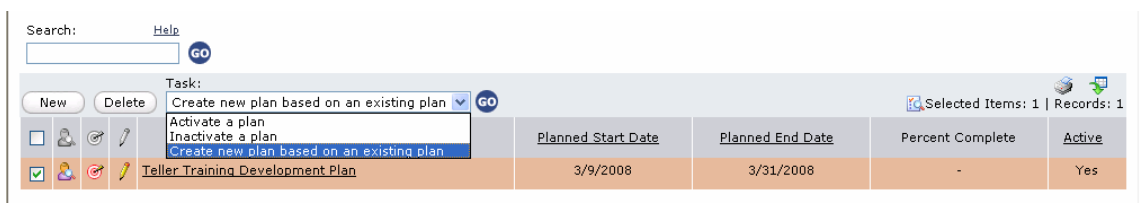
1. From the **Plan** menu, select **Development Plans**.
2. In the View list, select **Individual** or **Group**.
3. Click .
4. Enter the required information and any optional information you want to provide.
5. Click .

Clone/copy group development plans

You may now copy an existing group development plan! Often a great deal of work goes into creating a development plan. This feature saves you from replicating the work; you just make a copy and then change plan name, dates, add new plan participants, etc. as necessary. Note: All details related to the plan will come forward into the copy with the exception of plan participants.

To create a copy of an existing development plan














1. From the **Plan** menu, select **Development Plans**.
2. Select the plan to be copied via the check box.
3. In the Task drop down list, select 'Create new plan based on existing plan'
4. Click .



The screenshot shows a web interface for managing development plans. At the top, there is a search bar and a 'Help' link. Below that is a 'Task:' dropdown menu with options: 'Create new plan based on an existing plan', 'Activate a plan', 'Inactivate a plan', and 'Create new plan based on an existing plan'. The 'Create new plan based on an existing plan' option is selected. To the right of the dropdown, it says 'Selected Items: 1 | Records: 1'. Below the dropdown is a table with the following data:

	Planned Start Date	Planned End Date	Percent Complete	Active
<input checked="" type="checkbox"/> Teller Training Development Plan	3/9/2008	3/31/2008	-	Yes

Your copy will be created and is ready for any necessary changes:

   	Name 	Planned Start Date	Planned End Date	Percent Complete	Active
   	Copy of Teller Training Development Plan	3/9/2008	3/31/2008	-	Yes
   	Teller Training Development Plan	3/9/2008	3/31/2008	-	Yes




Adding to a Plan

You can add goals and activities to an existing individual development plan from many sections in CPDOnline. A development plan contains goals and goals contain activities. You can add goals and activities as your need for learning develops. This keeps your development plan relevant and current.

Adding a goal to a development plan

You can add a goal to a development plan from the Development Plans page.






To add a goal to a development plan:

1. From the **Plan** menu, select **Development Plans**.
2. On the Development Plans page, click the **Goals** icon  next to the appropriate plan.
3. On the Goals page click .
4. Enter the required information.
5. Click .

Adding a new activity

You can define any kind of activity to meet a goal in a development plan. Training from existing [learning activities](#) may be assigned. Analysis performed by the system can help you locate existing training if you want to move into another job or organization.






To define an activity for a goal:

1. From the **Plan** menu, select **Development Plans**.
2. On the Development Plans page, click the **Goals** icon  next to the relevant plan.
3. On the Goals page, click the **Activities** icon  for the relevant goal.
4. Click .
5. On the Select Activity Type page, choose **Define your own activity**.
6. Click .
7. Enter the information for the new activity.
8. Click .

Adding an existing learning activity to a goal

A development plan can show activities which contribute towards a goal. You can add any of the learning activities which you are allowed to view as a manager in the system.

To add a learning activity to a goal:

1. From the **Plan** menu, select **Development Plans**.
2. On the Development Plans page, click Goals icon  next to the relevant plan.
3. On the Goals page, click **Activities** icon  for the relevant goal.
4. Click .
5. On the Select Activity Type page, choose **Select from existing learning activities**.
6. Click .
7. Select the check box next to the learning activity you want to add.
8. Click .

Viewing a skills analysis

You can view the progress a user makes to acquire the skills which are necessary for a job or certification or other reasons. By analyzing the difference between the acquired skills and required skills, you can identify training to help the people you manage meet their proficiency requirements. Monitoring the skills of employees provides valuable information for training and hiring.


To conduct a skills analysis for a user:

1. Choose a person by clicking the **Select another user or your workgroup** link within the Getting Started area.
2. In the View list, select one of the following:
 - All skill requirements
 - All acquired skills
 - Skill requirements by competency
 - Skill requirements by job
 - Skill requirements by organization
 - User required skills (directly)
 - Skill certifications
3. Look in the Progress column on the right to view any gaps in the skill proficiency levels.
4. [Optional] Click the name of a skill to view a description, proficiency scale, and rating type. In sidebar on this summary page, choose Activities to view any activities associated with the skill.

Analyzing skills needed for a job

You can find out if an employee has acquired the skills for a particular job.

To compare the skills of a selected user with the skills required for a job:



1. Choose a user by clicking the **Select another user or your workgroup** link in the Getting Started area.
2. From the **Assess** menu, select **Alternate Job Analysis** and click **Job Skills Required**.
3. Click the name of the job.
4. Click  .

On the Skills Required page, the skills required for the selected job are listed in a table. Compare the numbers in the Required Proficiency column to the Acquired Proficiency column.

Adding to a plan based on skill analysis

Using a skill analysis report, you can select one or more skills that will become goals in an individual development plan.



To add to a development plan from a skill analysis:

1. From the **Assess** menu, choose **Skill Analysis**.
2. On the Skill Analysis page, select the skills you want to improve.
3. In the Task list, select **Add to a Development Plan**.
4. Click  .
5. On the Select Development Plan page, select a plan.
6. Click  .

Adding to a plan based on job analysis

Using a job analysis report, you can select one or more skills that will become goals in an individual development plan.

To add to a development plan from a job analysis:

1. From the **Assess** menu, choose **Alternate Job Analysis > Job Skills Required**.
2. On the Alternate Job Analysis page, select the job with the skills you want to add to your development plan.
3. In the Task list, select some or all skill and then **Add to a Development Plan**.
4. Click  .
5. On the Select Development Plan page, select a plan.
6. Click  .

About development plan reports

Development plan reports make it easy to view the progress of the people you manage. These reports provide more information than the development plan summary page.

The Development Plan Details report includes sections about the owner or participants, plan summary, and goals. This report can be generated for both individual and group development plans.

For group plans, the Development Plan Progress report is available. You can choose to view progress by user or by goal. In both cases, you can filter the results by business objective, if an objective has been associated with a goal.

The information provided above gives you general direction on development plans. For more instructions, go to CPDOnline's Help and search for [Development Plan](#).

Additional Information

Online help has more information about tasks you can complete in Manager mode. Click the help link while you are in Manager mode to access these topics.