SAIS/CISI CPD scheme
User guide

CONTENTS

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.

1.2 ABOUT THE SAIS CISI CPD SCHEME

The SAIS/CISI CPD Scheme enables users to demonstrate their compliance against the SAIS CPD requirements.

When accessing the CPD Scheme you will experience the following:

- Your CPD will run for 12 consecutive months

- When you participate in any of the CISI/SAIS's Professional Refreshers your CPD record will be automatically updated with the details, with no need for any manual input from you

- You will need to log any other CPD activities manually. You are strongly urged to collect and retain supporting evidence in case selected for audit – The CPD Scheme helps you achieve this by allowing you to upload evidence or other relevant documents as you go.

- A 28 day 'grace period' is allowed after your year expires during which you can update your log with any outstanding activities, provided they have been completed during the year in question

- After this 28 day 'grace period' 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.

1.3 PC AND BROWSER USE

The CPD Scheme is compatible with, and has been tested for use on PCs, iPhones and Android devices, with the following web browsers:

- Internet Explorer 11
- Safari
- Firefox
- Chrome
- Edge

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

Apple Mac Use
It is anticipated that the CPD Scheme will work on the above browsers on Apple Macintosh's (Macs), but this system has not specifically been tested on an Apple Macs and as such cannot guarantee that the log will work for Apple Mac users.

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.

Tablets (such as iPads)
It is anticipated that the CPD Scheme will work on the above browsers on tablets/iPad's , but this system has not specifically been tested on this and as such cannot guarantee that the scheme will work.

Microsoft Excel
The 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 SAIS/CISI accepts no responsibility for use of the SAIS log on any other browsers or platforms, or for use of the Beta version of the log.

The SAIS/CISI strongly recommends that users consult with their IT department before downloading any software and the SAIS 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 SAIS/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.

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

2.1 ADDING AN ENTRY TO THE CPD LOG

BACKGROUND
Elearning activities undertaken through MySAIS will be auto logged within your CPD record. All other activities undertaken through will be required 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.

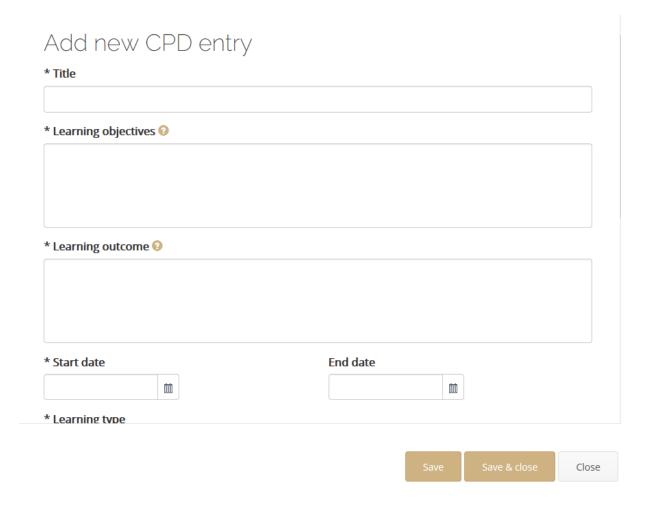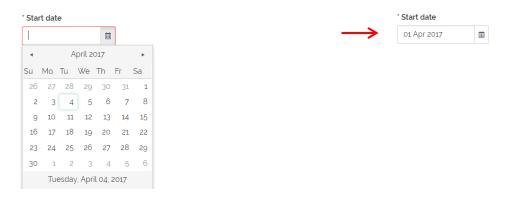2. Click on the 'Add New CPD Entry' button.

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

Add new CPD entry

* Title

* Learning objectives ❓

* Learning outcome ❓

* Start date

* End date

* Learning type

Save   Save & close   Close

ENTERING THE ACTIVITY DETAIL

1. 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**.

2. Click in the 'Learning Objectives' field and enter some text (min. 30 characters) describing what the activity relates to. **This is a mandatory field**.

3. Next, click in the 'Learning Outcome' field) and describe what you learnt by undertaking the activity (min. 30 characters). Please 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**.

4. Click on the '?' to open the CISI guide to learning objectives and outcomes for further guidance on what to include in a learning outcome.

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. You can log a maximum of 8 hours per day.

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).

11. If relevant, enter a grade in the 'Grade' field (e.g. for activities where a graded result is given).

12. 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**.

13. 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.

14. 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.

15. 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.

16. The entry will now appear on the current CPD log (shown on the 'My CPD' page).

2.2 IMPORTING ENTRIES ONTO YOUR CPD LOG

BACKGROUND
It is possible to import CPD entries into your log by using the Excel Template through the CPD entries page.

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 downloaded, 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.

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.

Import CPD entries

Download Excel template

Import CPD entries	Select files...	Done ✓

Result	Row	Worksheet
Created successfully	2	Sheet1$

10) To go back to your CPD Year summary click the **(X)** on the right-hand side of the Import CPD entries box.

11) The entry imported will be visible for you to view under CPD year entries.

| CPD YEAR ENTRIES | | | | | | | | | ALL | STRUCTURED | UNSTRUCTURED |

Activities from [ ] 📅 Activities to [ ] 📅 Show emails from superusers ☑

Reset	Filter

📊 Export to Excel   📄 Export to PDF   Search [   ]

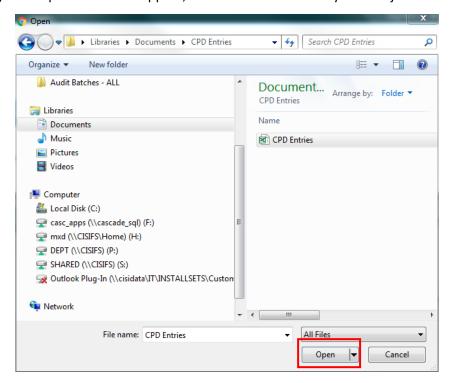|	Title	Learning Objectives	Learning Outcome	Start date ▼	Hours	CPD learning type	CPD category	Structured	Can Audit Entry	Evidence attached	Auto-logged
Edit Copy Remove	Uk Team Meeting	Overview of markets and products	Understanding the latest products launched	01 Mar 2017	02.00	I have attended	Other	✔	✖	✖	✖

|◄ ◄ 1 | 1 | ► ►| 20 ▼ items per page   1 - 1 of 1 items

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.

2.3 UPLOADING SUPPORTING EVIDENCE TO A MANUAL ENTRY

BACKGROUND

Supporting evidence can be attached to a manual entry. 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 you would like to upload any other file types then the SAIS must be contacted at CPD@sais.co.za.

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 'CPD Log Entries' page will open.

OPEN THE ENTRY & ADD EVIDENCE

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

| Edit Copy Remove | Uk Team Meeting | Overview of markets and products | Understanding the latest products launched | 01 Mar 2017 | 02.00 | I have attended | Other | ✔ | ✖ | ✖ | ✖ |

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

Edit

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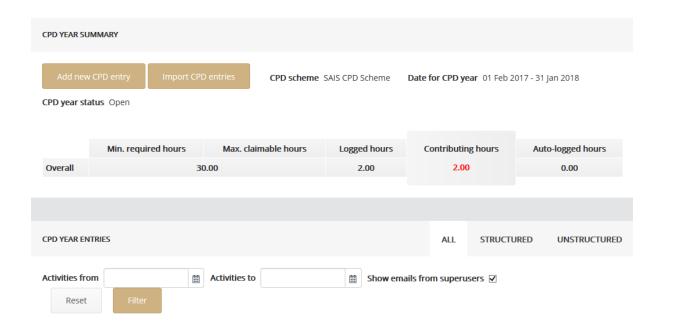
4. Click on the 'Select Files' button in the 'Upload Evidence' field.

Structured

☑

Score

```
0
```

Grade

```

```

* Hours

```
2
```

Can audit entry

☐

Upload evidence

Files will be uploaded when you press save

Select files...

Remove	File name	Uploaded

Note: Required fields are marked with an asterisk (*)

Save   Save & close   Close

Select files...

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 SAIS at CPD@sais.co.za

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'.

2.4 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 'CPD Log Entries' page will appear.

CPD log

Edit and create CPD entries for the selected CPD year

CPD YEAR SUMMARY

Add new CPD entry   Import CPD entries   **CPD scheme** SAIS CPD Scheme   **Date for CPD year** 01 Feb 2017 - 31 Jan 2018

CPD year status Open

	Min. required hours	Max. claimable hours	Logged hours	Contributing hours	Auto-logged hours
Overall	30.00		2.00	2.00	0.00

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.

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.

2.5 EDITING AN EXISTING SAIS 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.
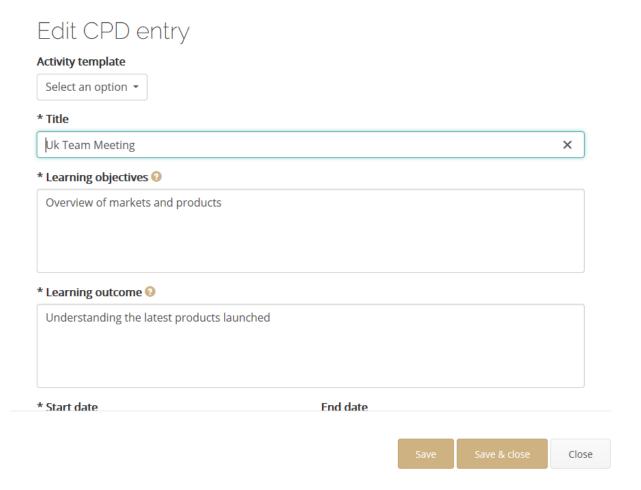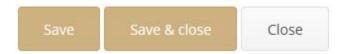
EDIT THE ENTRY

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.

Edit CPD entry

Activity template

Select an option ▾

* Title

Uk Team Meeting   ✕

* Learning objectives ❓

Overview of markets and products

* Learning outcome ❓

Understanding the latest products launched

* Start date   **End date**

Save   Save & close   Close

5. You will now be able to enter details in the 'Objective' & 'Outcome' field (i.e. why you had undertaken the activity and what was learned from undertaking the activity).

* Learning outcome ❓

Understanding the latest products launched

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.

Save   Save & close   Close

2.6 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 auto-logged activities.

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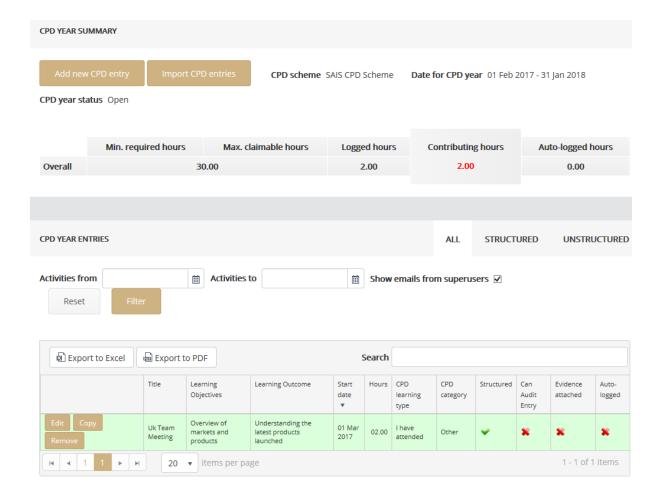To copy an existing entry and create a new one from it:

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.

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.
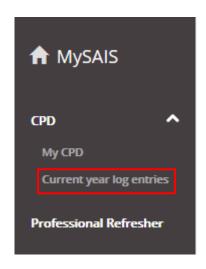

6. The newly created entry will appear in the list of existing CPD entries, in addition to the original.

2.7 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. If an entry of this type needs to be removed, please email CPD@sais.co.za detailing the reason why.

ACTION
To remove a manual entry from the current CPD year:
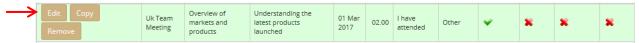
OPEN THE RELEVANT CPD LOG ENTRIES PAGE

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.
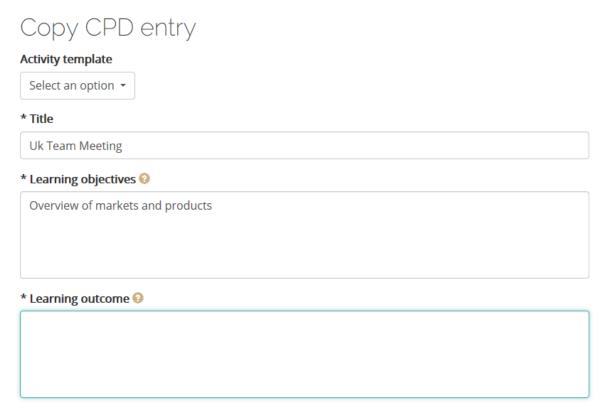
CPD YEAR SUMMARY

| Add new CPD entry | Import CPD entries | **CPD scheme** SAIS CPD Scheme | **Date for CPD year** 01 Feb 2017 - 31 Jan 2018 |

CPD year status Open

	Min. required hours	Max. claimable hours	Logged hours	Contributing hours	Auto-logged hours
Overall	30.00		2.00	2.00	0.00

CPD YEAR ENTRIES   ALL   STRUCTURED   UNSTRUCTURED

Activities from [ ] 📅   **Activities to** [ ] 📅   Show emails from superusers ☑

| Reset | Filter |

| 📊 Export to Excel | 📄 Export to PDF | | Search [ ] |

	Title	Learning Objectives	Learning Outcome	Start date ▼	Hours	CPD learning type	CPD category	Structured	Can Audit Entry	Evidence attached	Auto-logged
Edit Copy Remove	Uk Team Meeting	Overview of markets and products	Understanding the latest products launched	01 Mar 2017	02.00	I have attended	Other	✔	✖	✖	✖

REMOVE THE ENTRY

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

→
| Edit Copy Remove | Uk Team Meeting | Overview of markets and products | Understanding the latest products launched | 01 Mar 2017 | 02.00 | I have attended | Other | ✔ | ✖ | ✖ | ✖ |

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

→   Remove

3.1 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 'Auto-logged'. 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.

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

My CPD

Your CPD year history

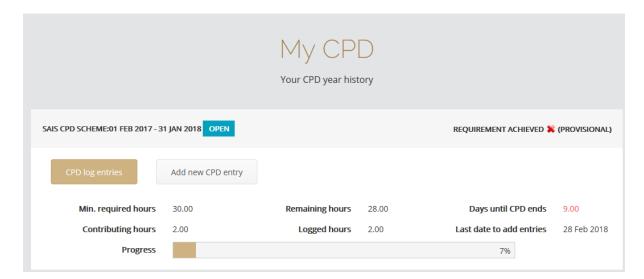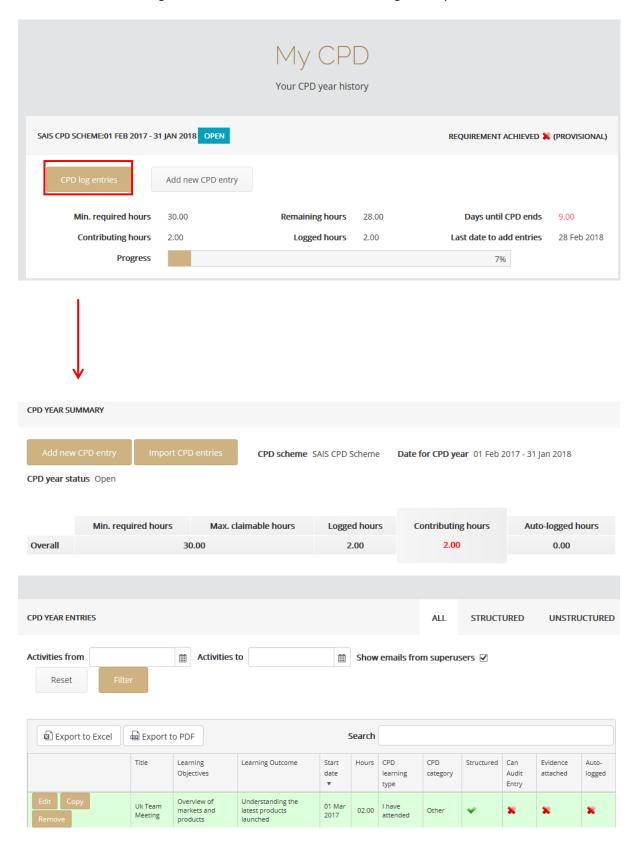SAIS CPD SCHEME:01 FEB 2017 - 31 JAN 2018 OPEN   REQUIREMENT ACHIEVED ✖ (PROVISIONAL)

| CPD log entries | Add new CPD entry |

Min. required hours	30.00	Remaining hours	28.00	Days until CPD ends	9.00
Contributing hours	2.00	Logged hours	2.00	Last date to add entries	28 Feb 2018
Progress					7%

CPD YEAR SUMMARY

| Add new CPD entry | Import CPD entries | CPD scheme SAIS CPD Scheme   Date for CPD year 01 Feb 2017 - 31 Jan 2018

CPD year status Open

	Min. required hours	Max. claimable hours	Logged hours	Contributing hours	Auto-logged hours
Overall	30.00		2.00	2.00	0.00

CPD YEAR ENTRIES   ALL   STRUCTURED   UNSTRUCTURED

Activities from [ ] 🗓 Activities to [ ] 🗓 Show emails from superusers ☑

| Reset | Filter |

| 📊 Export to Excel | 📄 Export to PDF | Search [ ] |

	Title	Learning Objectives	Learning Outcome	Start date ▼	Hours	CPD learning type	CPD category	Structured	Can Audit Entry	Evidence attached	Auto-logged
Edit Copy Remove	Uk Team Meeting	Overview of markets and products	Understanding the latest products launched	01 Mar 2017	02.00	I have attended	Other	✔	✖	✖	✖

3.2 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
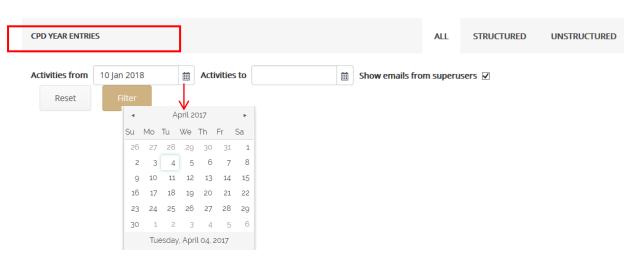c) by entering keywords in 'Search' to show only those entries that contain matching information

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.
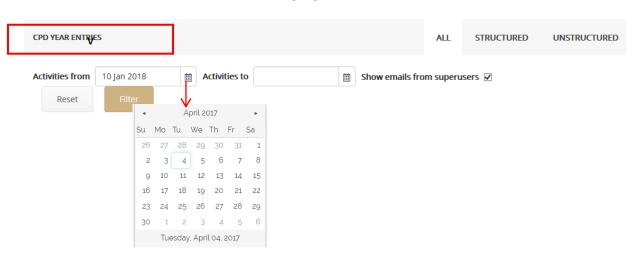
ACTION

To filter CPD Log entries, first open the 'SAIS 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.
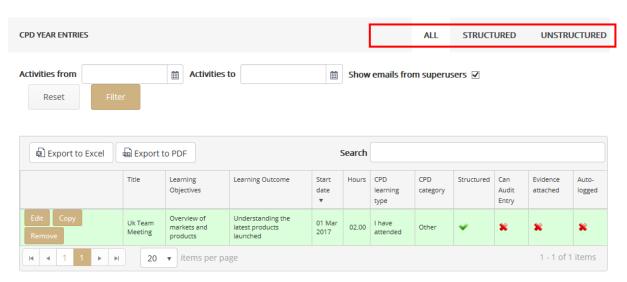
3. With the date range now set, click the 'Filter' button below the date fields. The entries will be filtered and displayed accordingly.
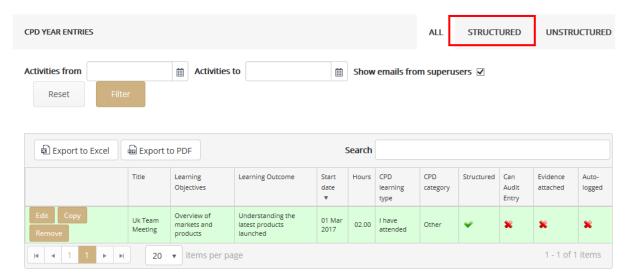

FILTER BY ELEMENT

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.

3.3 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.
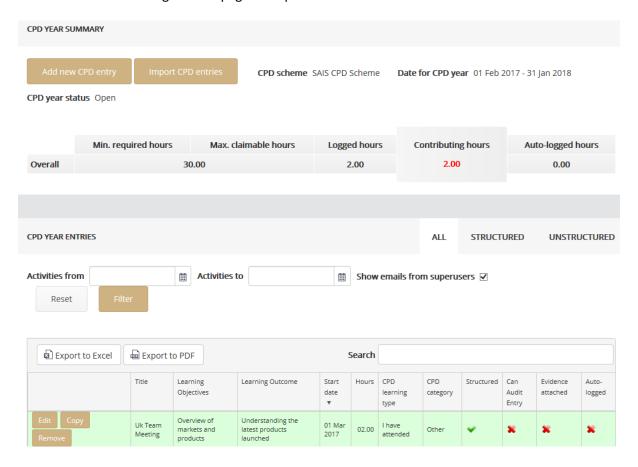
ACTION
To include a view of Superuser emails, follow the steps below:

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.

CPD YEAR SUMMARY

Add new CPD entry   Import CPD entries   **CPD scheme** SAIS CPD Scheme   **Date for CPD year** 01 Feb 2017 - 31 Jan 2018

CPD year status Open

	Min. required hours	Max. claimable hours	Logged hours	Contributing hours	Auto-logged hours
Overall	30.00	2.00	2.00	2.00	0.00

CPD YEAR ENTRIES			ALL	STRUCTURED	UNSTRUCTURED

Activities from [🗓] **Activities to** [🗓] Show emails from superusers ☑

Reset   Filter

🔲 Export to Excel   📄 Export to PDF   Search [ ]

	Title	Learning Objectives	Learning Outcome	Start date ▼	Hours	CPD learning type	CPD category	Structured	Can Audit Entry	Evidence attached	Auto-logged
Edit Copy Remove	Uk Team Meeting	Overview of markets and products	Understanding the latest products launched	01 Mar 2017	02.00	I have attended	Other	✔	✖	✖	✖

SUPERUSER EMAIL SETTING

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

CPD YEAR ENTRIES			ALL	STRUCTURED	UNSTRUCTURED

Activities from [10 Jan 2018 🗓] **Activities to** [🗓] Show emails from superusers ☑

Reset   Filter

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

CPD YEAR ENTRIES			ALL	STRUCTURED	UNSTRUCTURED

Activities from [10 Jan 2018 🗓] **Activities to** [🗓] Show emails from superusers (☑)

Reset   Filter

4.1 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.
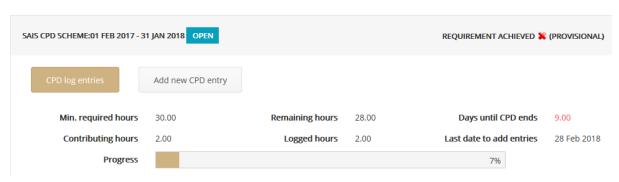
ACTION

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.
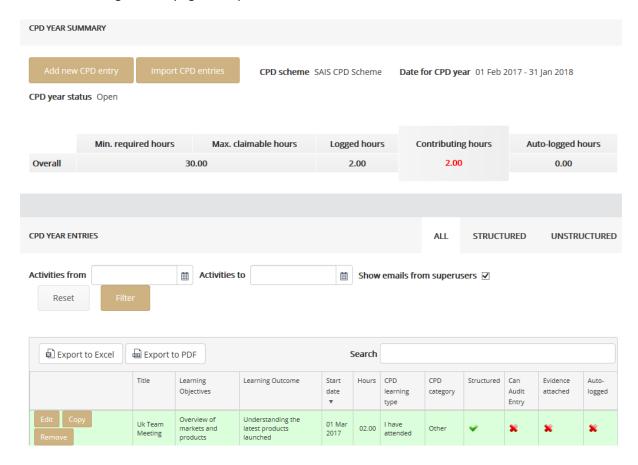

2. Locate the correct CPD year which you wish to view. Please note years which are current will have *'Open'* written next to them and previous years will have *'Closed'* next to them.

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

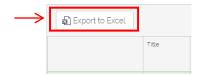4. The 'CPD Log Entries' page will open.

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.