CPD Online System Help

Table of Content

CPD ONLINE SYSTEM HELP **1**

TABLE OF CONTENT **1**

1. INTRODUCTION **2**

2. LOGIN **2**

2.1 Username and Password *2*
2.2 Forgot Password *3*

3. SUBMIT A COURSE ATTENDANCE **4**

3.1 Select Course *4*
Selecting a Course *4*
Selecting a Course Date *5*
3.2 File Upload *5*
File Format and Layout *6*
Browse for File and Upload *7*
File Validation *8*
Error Handling *9*
3.3 MANUAL SEARCH FOR AN ATTENDEE 10
Search Parameters *11*
3.4 SELECTED ATTENDEES 12
Submit the Course Attendance *13*
Course Attendance Receipt *14*

4. LICENSEE SEARCH **14**

5. ADMINISTRATION **15**

5.1 Selecting a Course *16*
5.2 Validate Attendees *16*
5.3 View Attendees *19*
Selecting Dates *19*
View Attendees *19*
View Errors *20*

6. MAINTAIN USERS **22**

6.1 Add User *23*
6.2 Edit/Delete User *26*
6.3 Reset Password *27*

7. CHANGE PASSWORD **29**

8. LOGOUT **29**

1. Introduction

The Department of Energy, Mines, Industry Regulation and Safety (DEMIRS), Consumer Protection Division (Consumer Protection), provides a facility for approved course providers to register the attendees to their courses.

The DEMIRS website (http://www.demirs.wa.gov.au/) contains a link to allow the course providers to login and lodge the attendees to their courses.

2. Login

To log into the CPDOnline system (Continuing Professional Development Online System), a link will be provided to the DEMIRS website.

From the location of the respective source website, the CPDOnline system will associate the appropriate style and business rules.

2.1 Username and Password

For a course provider to login, the username and password will be issued by Consumer Protection.

Username and Password both are mandatory fields. Users have a limited number of attempts to log in and will be locked out for 10 minutes if you have exceeded the number of attempts.

Once authenticated and authorised to log in, the system will take you to the ***Submit a Course Attendance*** page.

2.2 Forgot Password

If the user has forgotten their password, click on the “Forgot password” link. If the “Forgot password” link is used, the user will be presented with a screen to enter their Username and Email address.

After providing username and email details, an email will be sent to the User’s email address to follow the reset password link.

After clicking on the link, the change password screen will be presented.

- Enter the Username
- New password – This must be at least 8 characters in length, with at least one uppercase character, one lower case character, and one number
- Confirm password
- Save

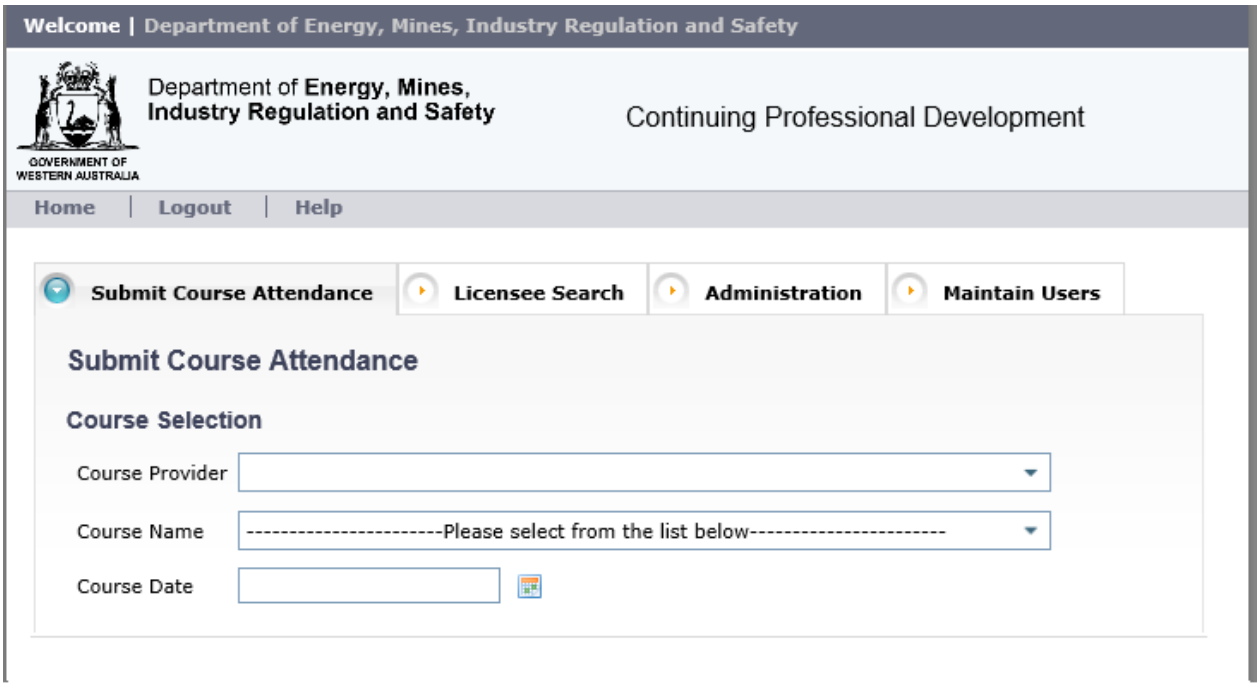
3. Submit a Course Attendance

3.1 Select Course

This page allows you to submit a new course attendance. The following are mandatory fields:

- Course Name
- Course Date
- Attendee(s)

Attendee search and file upload selection appear after the course and course date are selected



Selecting a Course

The system will display a dropdown of approved courses in the ***Course Name*** field. Only the courses that have been approved to you are shown on the selection list.

The list is sorted based on the ***Course Approval Number***.

By selecting (or changing) a course, the ***CPD Points*** and course type, ***Mandatory or Elective*** (and ***Category 4*** if applicable) will be updated automatically to reflect the selected course details.

You may only change the course prior to selecting attendees.

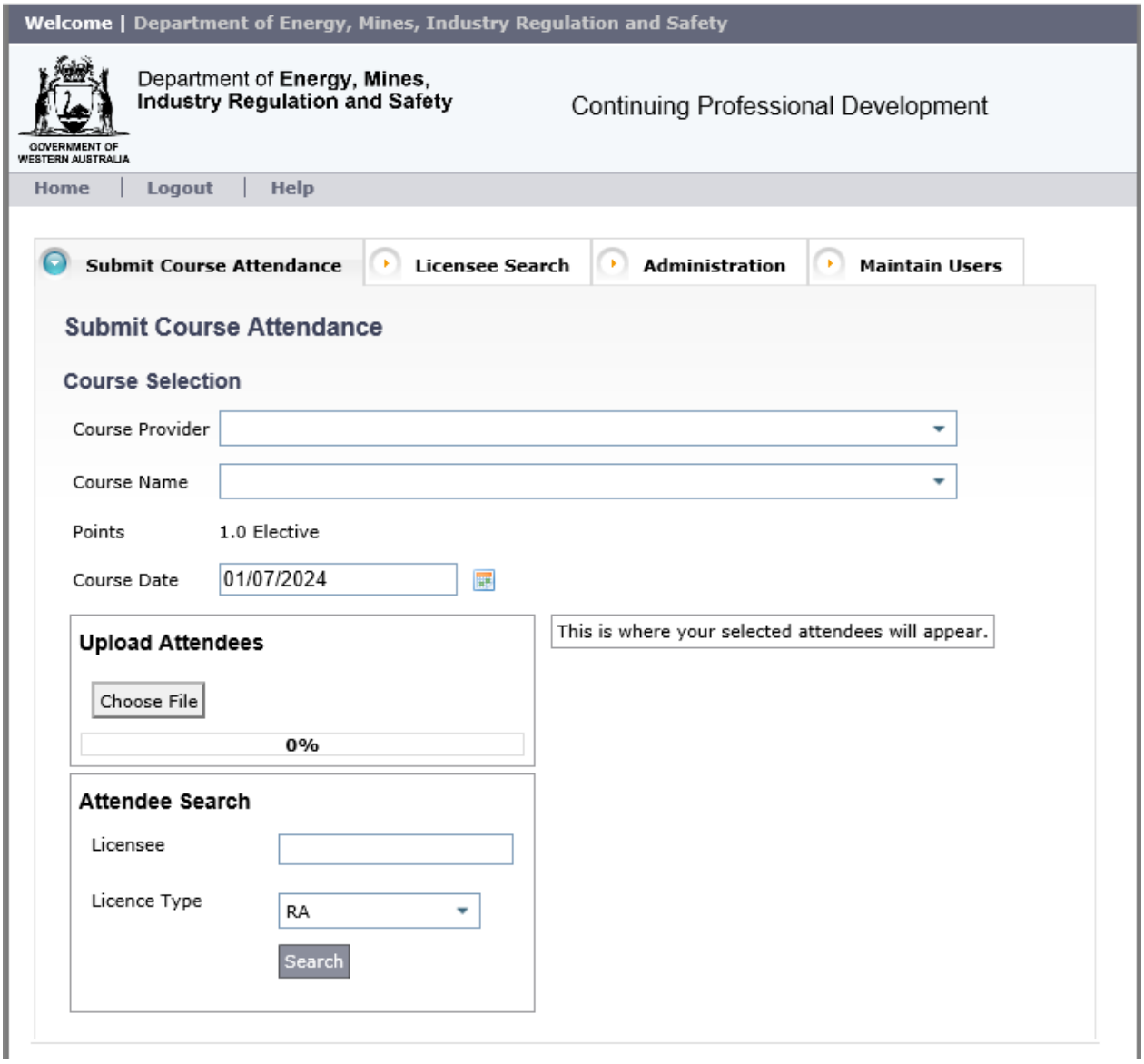
Selecting a Course Date

Course Date field is mandatory, and the system will allow only past or current dates to be selected. This is the date that the course was held.

Dates can be entered manually or picked from the date picker grid display. You may only change the ***Course Date*** field prior to selecting attendees.

3.2 File Upload

Upload Attendees section (located on the LH side, immediately below course date) allows the user to browse for a csv file on their computer and upload it.



File Format and Layout

Attendee data in the file, must be in the following order:

- Surname
- First Name
- Licence Type (eg. RA, RR, SA, SB)
- Licence Number

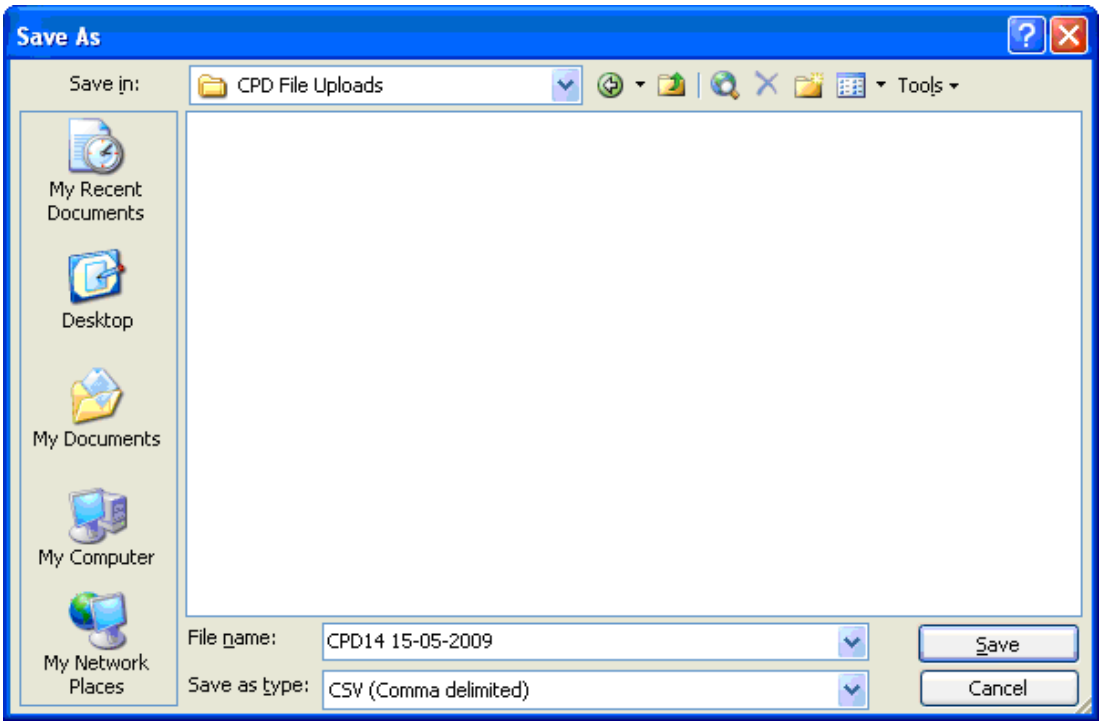
A sample file, prepared in excel, is shown below:

	A	B	C	D	E
1	DAY	ALAN	RA	363	
2	COOK	Brett	RA	50777	
3	DAVIS	FRANK	RA	40114	
4	DAVEY	ROBERT	RA	4750	
5	DI ROSSO	GINO	RA	48811	
6	GELVIN	Mary	RA	45001	
7					
8					
9					
10					

After preparing a file in excel, it must be saved in csv format. To do this, while in the spreadsheet, you will need to select File ► Save As, from the top menu:

- File name – your choice
- Save as type – must be ***CSV (Comma delimited)***

See below for a screen print of the save as window in Excel



Other points to note about file format:

- If prepared in excel, no column headings or titles or footers are permitted
- Data can be in upper or lower case – validation is not case sensitive
- Names or numbers cannot include any embedded commas – as these would be confused with the commas which are column delimiters used in csv

The previous sample file would look like this (in Notepad), when saved in csv format:

DAY,ALAN,RA,363
COOK,Brett,RA,50777
DAVIS,FRANK,RA,40114
DAVEY,ROBERT,RA,4750
DI ROSSO,GINO,RA,48811
GELVIN,Mary,RA,45001

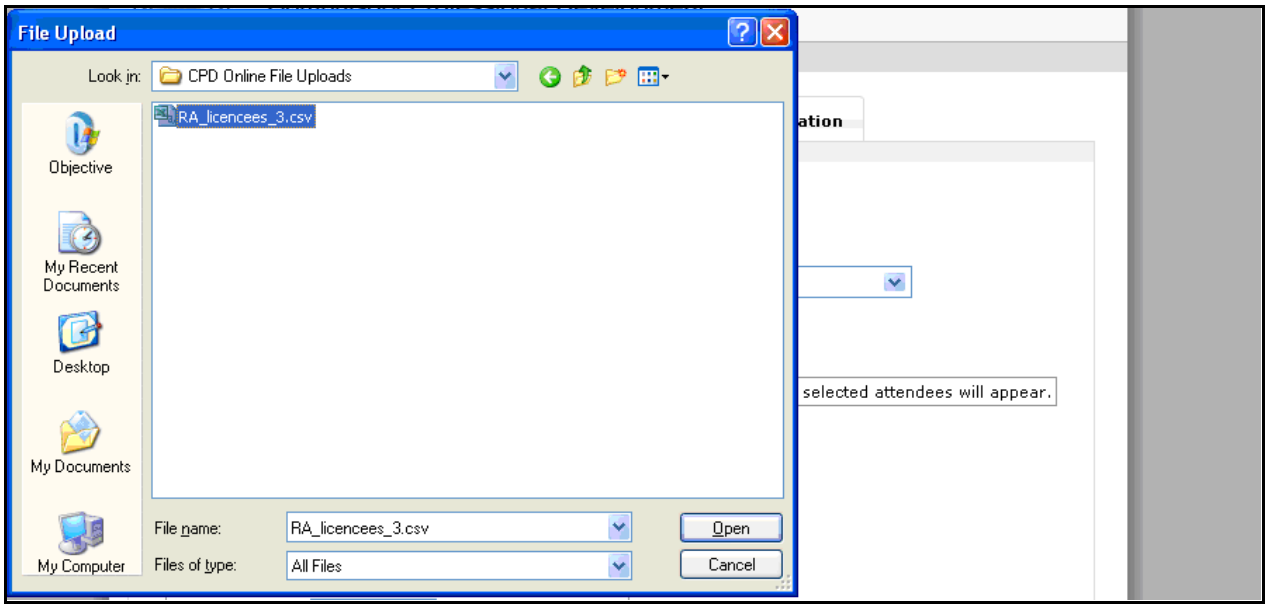
(To view the file using Notepad - in windows explorer, right click on the file and select Open With ► Notepad.)

Browse for File and Upload

Now that your file is prepared and saved in csv format, in the Submit Course Attendance screen, browse to find the file on your pc:

- Click on ***Browse*** button, in CPDOnline
- Choose file window opens
- Locate the file on your pc and click on the filename
- Click on the ***Open*** button

Click the ***Upload*** button to validate the file and load it into ***Selected Attendees*** area. The **Submit Course Attendance** button must be clicked to save attendance data.



File Validation

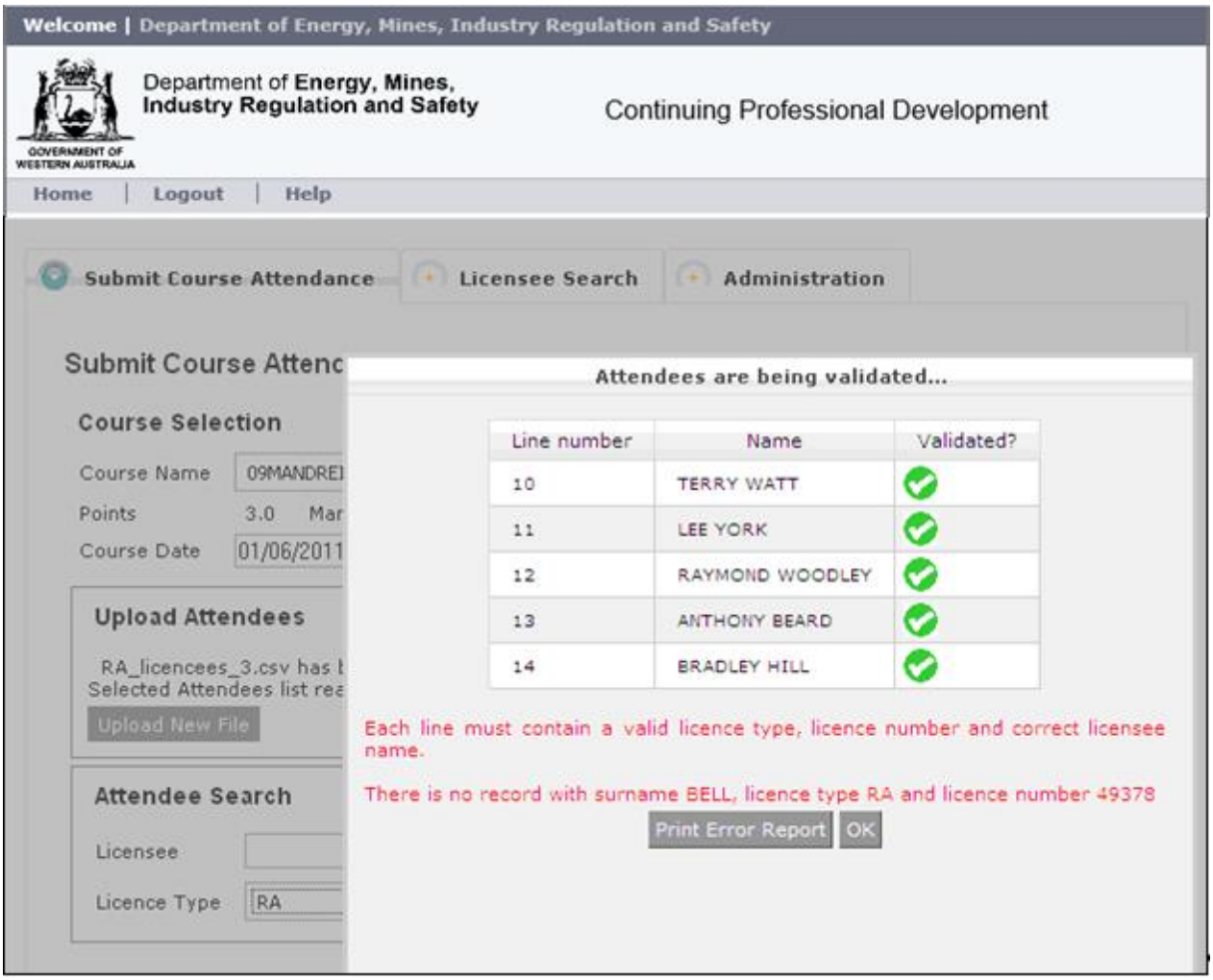
After the Upload button is clicked, a validation window will display, which shows the progress of validation. A sample validation window is shown below.

Validation window shows:

- Line number
- Name
- Green tick as the record is validated

To make the display manageable, blocks of records are shown as validation progresses

The file will stop processing when it encounters the ***first*** error and the entire file will be rejected.



Error Handling

The file upload stops at the first error and an error message displays. Any preceding valid lines are also displayed and an error message with detail of the rejected line.

You can either:

- Click on the ***Print Error Report*** button to display and print a report of the error
- Click ***OK*** to return to the Submit Course Attendance screen

Note that the entire file is rejected, you need to correct (or delete) the record in error and re-submit the file. You can check licence numbers by querying a name in the ***Licensee Search*** tab.

In the example shown on the previous page, 14 lines have been accepted, so it is line 15 – BELL RA 49378 – which is in error.

Possibly the easiest way to deal with errors, is to have the csv file open as you do the file upload – then you can:

- Swap back to the file and find the line in error
- Close the error window in CPDOnline
- Do a name search in CPDOnline to find the licensee
- Swap back to the file and correct the record
- Then you are ready to upload the file again.

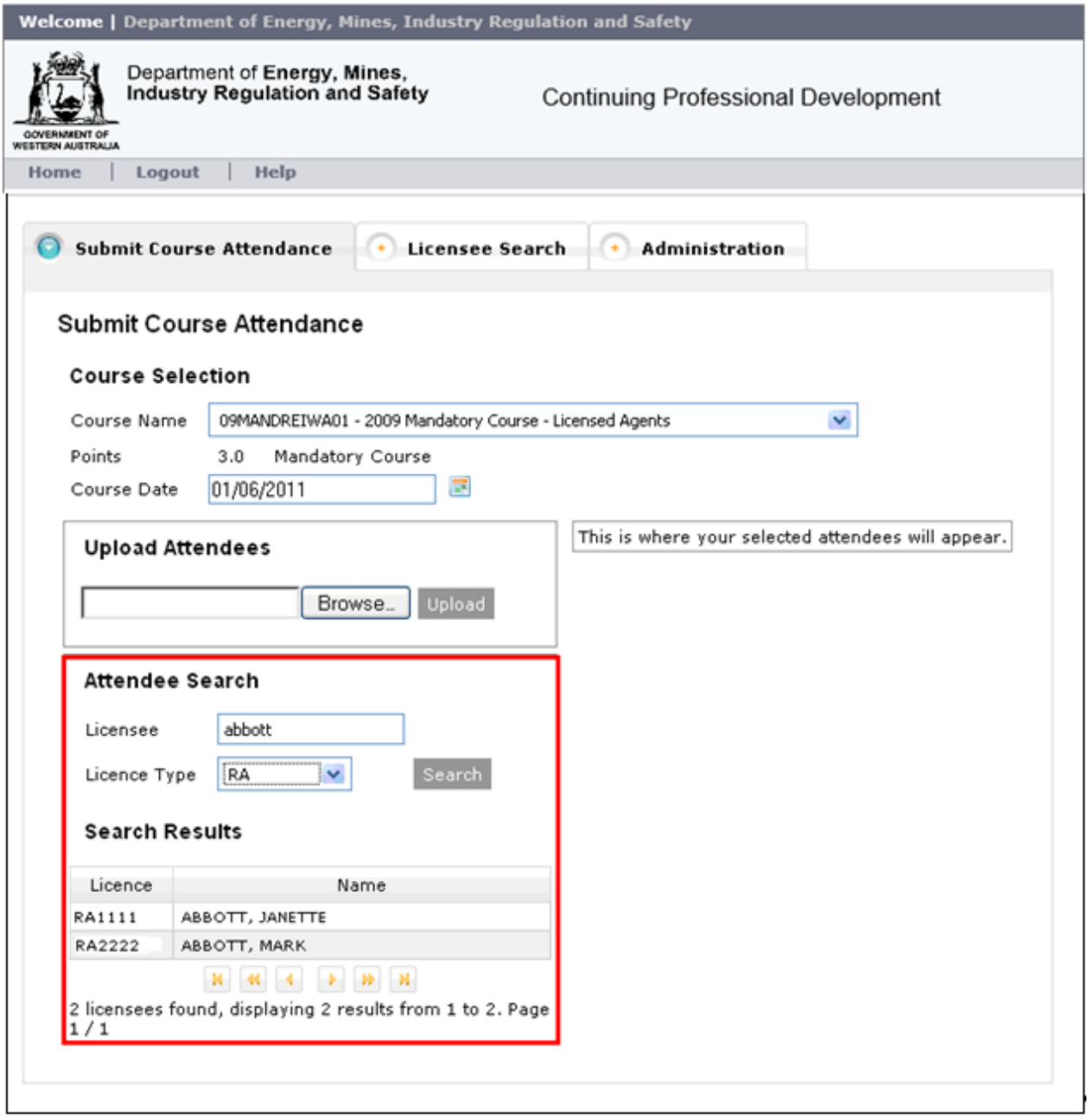
Note that after you make a correction in the csv file, you should enter or click, to move to a new cell, before you save the file (the file can't be saved until the edit is completed).

Tip: There is a facility in the Administration tab to **Validate Attendees.** Here a file upload can be validated and all errors listed, with an option to print a report. So you can correct all errors in the file before attempting an actual upload.

3.3 Manual Search for an Attendee

Attendee Search appears on the left-hand side of the screen after Course Name and Date are entered, and is used to search for and select Licence Holders who have attended the course.

Only the appropriate agent licensee holders will be shown and selectable, consistent with the login system selected – REBA or SASB.



Note that there is a known issue, within the ***Submit Course Attendance screen*** for ***Attendee Search*** with ***Apple Mac users***, where the page numbers and result counts do not appear for the first search that you do. After you have added attendees to the Selected Attendees list, the problem disappears. Also, if you press the refresh icon, at the top of the screen, the problem is rectified.

Search Parameters

Licence type can be selected (list will be consistent with login – ie Real Estate or Settlement Agent) or "All" licensees can be searched

Licensee - the system provides a google like search where you specify full or partial data for:

- Name or names OR
- Licence number OR
- Licence number and name/s

Note that no special characters can be used in a search, only letters or numbers. So that for a name like O'Connor, you would have to search on Connor.

All record matches on surname, first name, other name and licence number will display in licence name order.

To select an Attendee, click on their name to add them to the ***Selected Attendees*** list

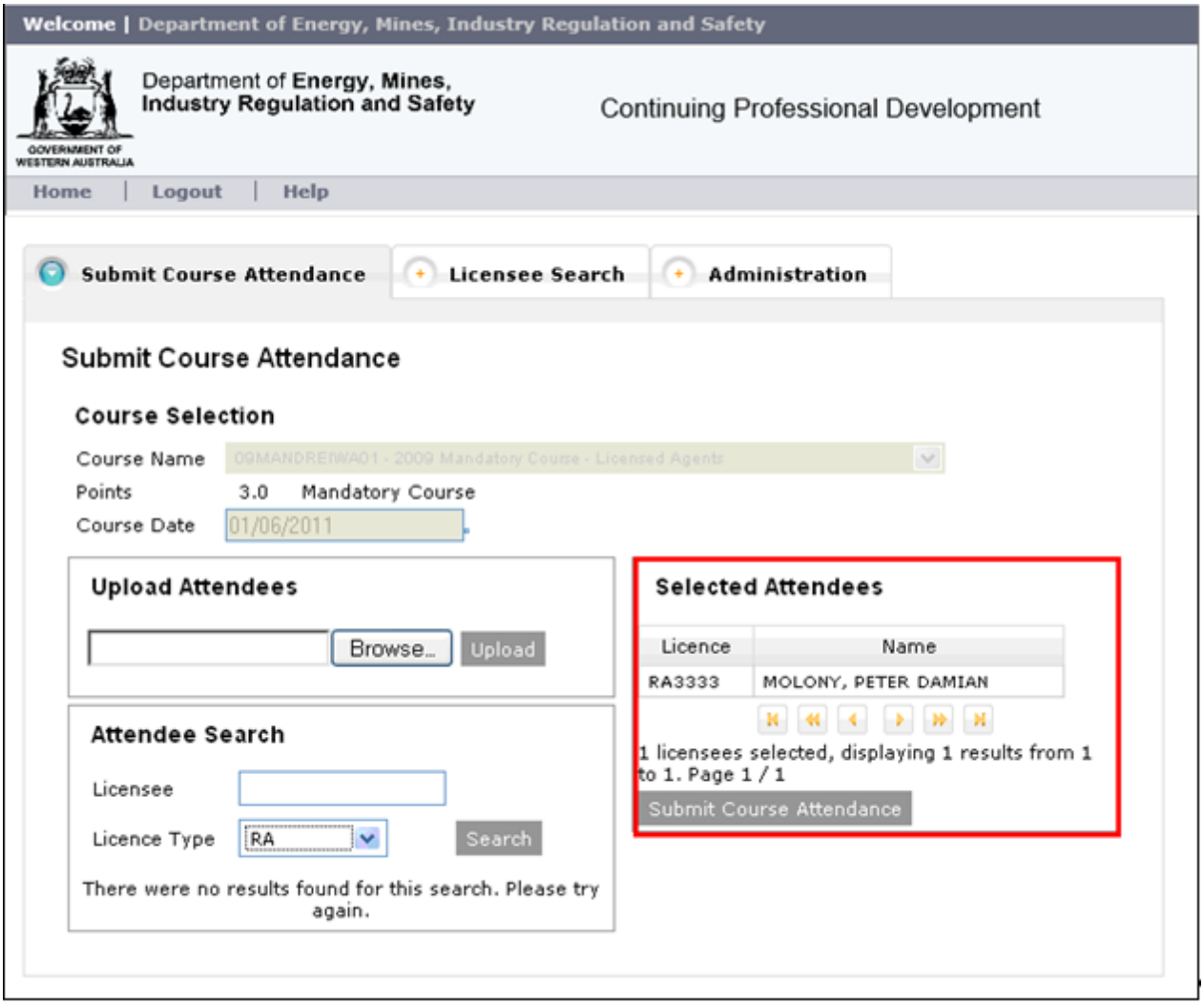
Please note that a licensee cannot attend the same course within a calendar year and that such a duplication will result in an error message.

Continue conducting searches to find and select more attendees, until ***Selected Attendees*** list is complete.

3.4 Selected Attendees

The ***Selected Attendees*** list remains displayed on the right side of the screen, as it is being built (by file upload, search or a combination of both). To remove a licence holder from the ***Selected Attendees*** list, simply click on the Licensee and they will be removed.

The ***Selected Attendees*** list displays licence holders in the order selected (or for a file upload, in ***Licensee Name*** order).

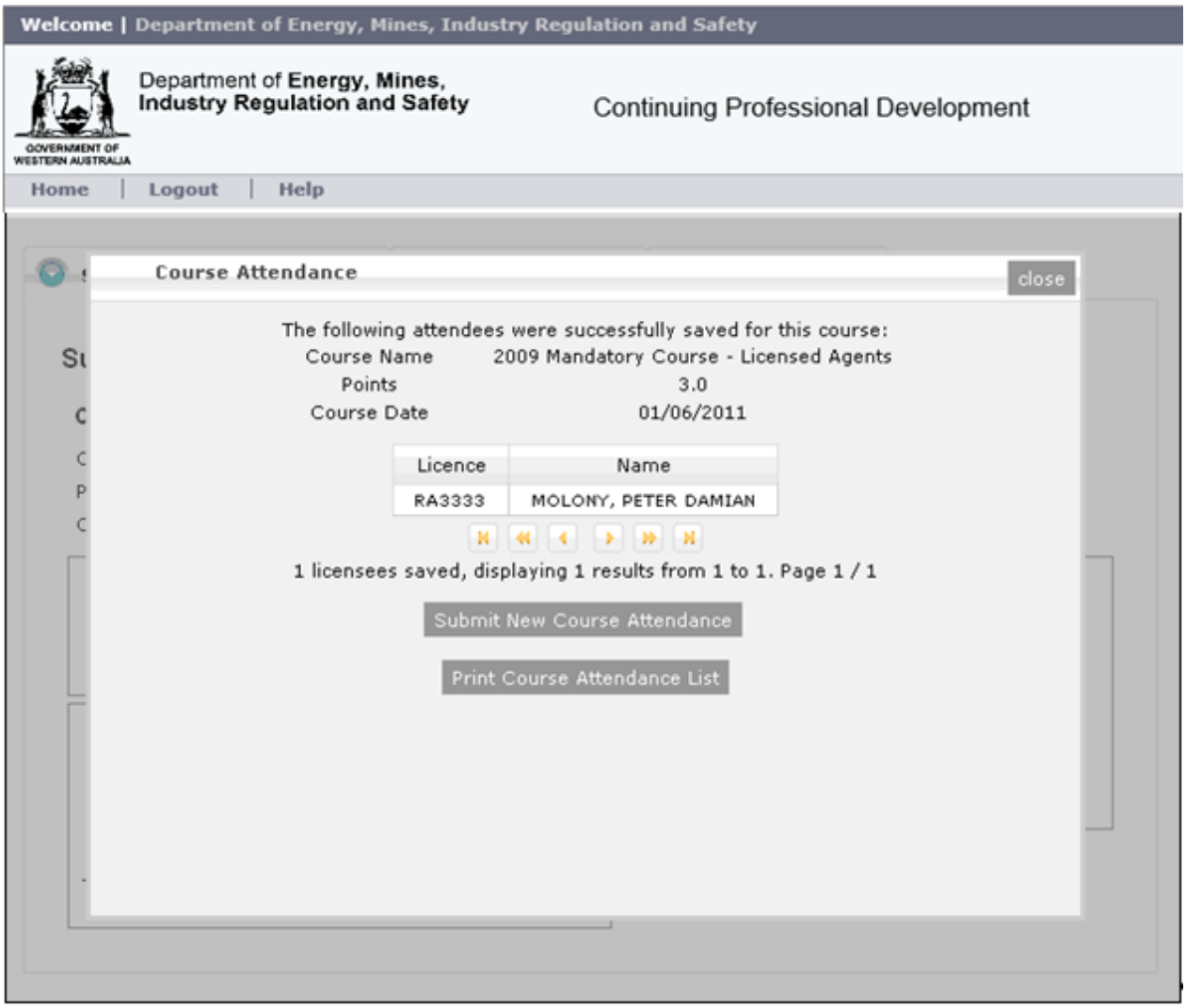


Submit the Course Attendance

To submit a completed Selected Attendee list, just click on the ***Submit Course Attendance*** button.

Ensure details are checked before the course is submitted as they can only be amended by Departmental staff after this point.

A Course Attendance receipt is displayed, once the system accepts the submission



Click on the ***Print Course Attendance*** button, to obtain a printed receipt (see next section for details). Use the ***Submit Course Attendance*** button or the ***Close*** button to return to the Submit Course Attendance screen to enter another course.

Course Attendance Receipt

You can print a Course Attendance Receipt by clicking on the ***Print Course Attendance List*** button (see sample receipt below). Course Attendance Receipts can be re-printed at a later time, also, in the Administration tab.

GOVERNMENT OF WESTERN AUSTRALIA

Department of **Energy, Mines, Industry Regulation and Safety**

Course Attendance List

Course Provider : REAL ESTATE INSTITUTE OF WESTERN AUSTRALIA INC
Course Name : 24MREIWA-SR-RES-ONLINE - 2024 Sales Representatives - Residential - Online self-paced
CPD Points : 3.0
Mandatory : Y
Category 4 : N
Course Date : 01-Jul-2024

Licence	Attendee
RA1233	Hender, John

Attendee Count: 1

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When you click on the ***Print Course Attendance List*** button, a new window opens containing the ***Course Attendance Receipt***. This receipt and can be printed using the File ► Print commands at the top of the screen.

Note that if the receipt window does not pop up on your screen, it will be available to select, as a new explorer window, on the bottom task bar of your screen.

You just click on the windows X to close the screen when finished.

4. Licensee Search

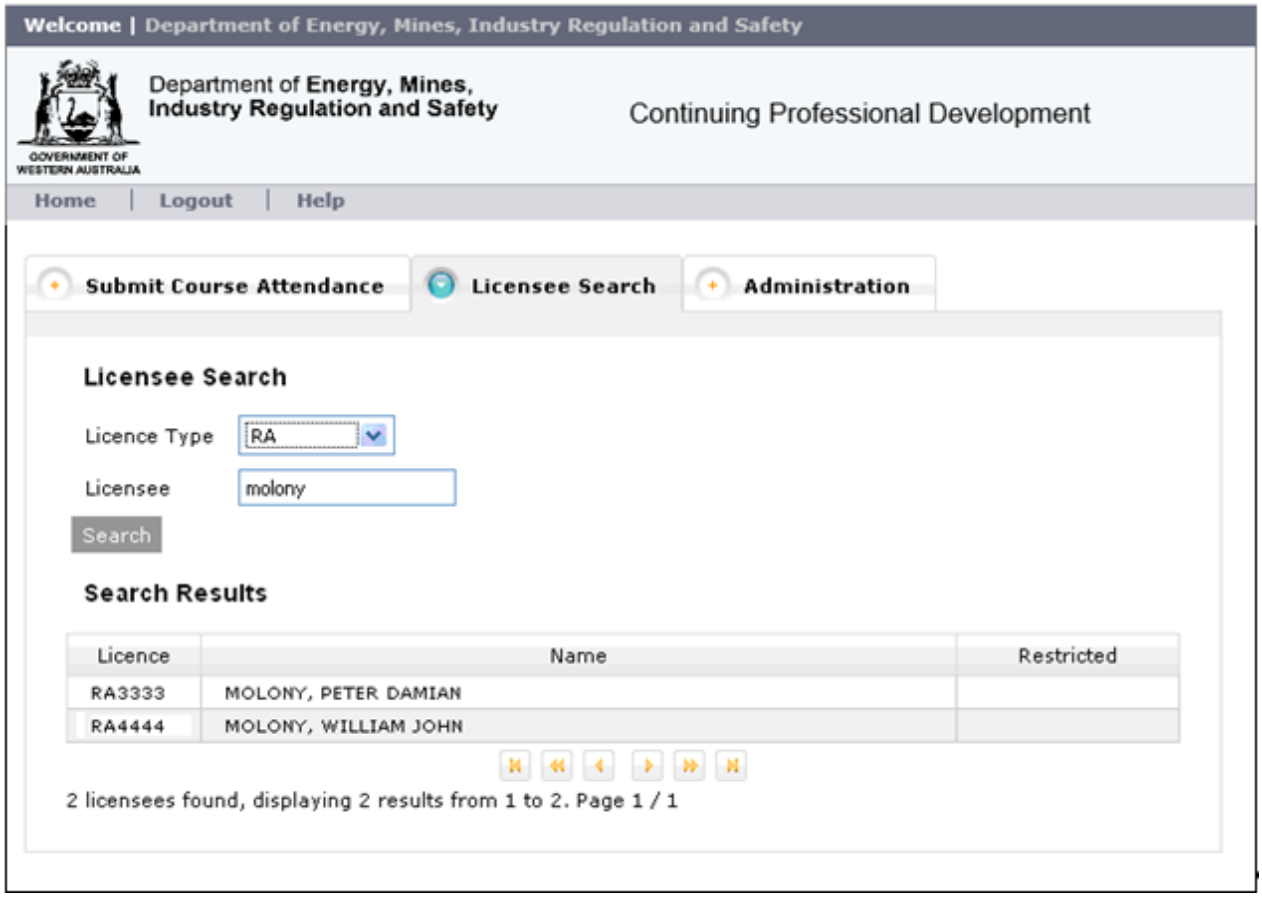
This screen enables users to search for Licence Holders by name or number. For Real Estate Representatives Licence Holders, the search results will also show whether or not the Licensee holds a restricted licence (for Property Management).

Licence type can be selected (consistent with login system) or “All” licensees can be searched

Licensee - the system provides a google like search where you specify full or partial data for:

- Name or names OR
- Licence number OR
- Licence number and name/s

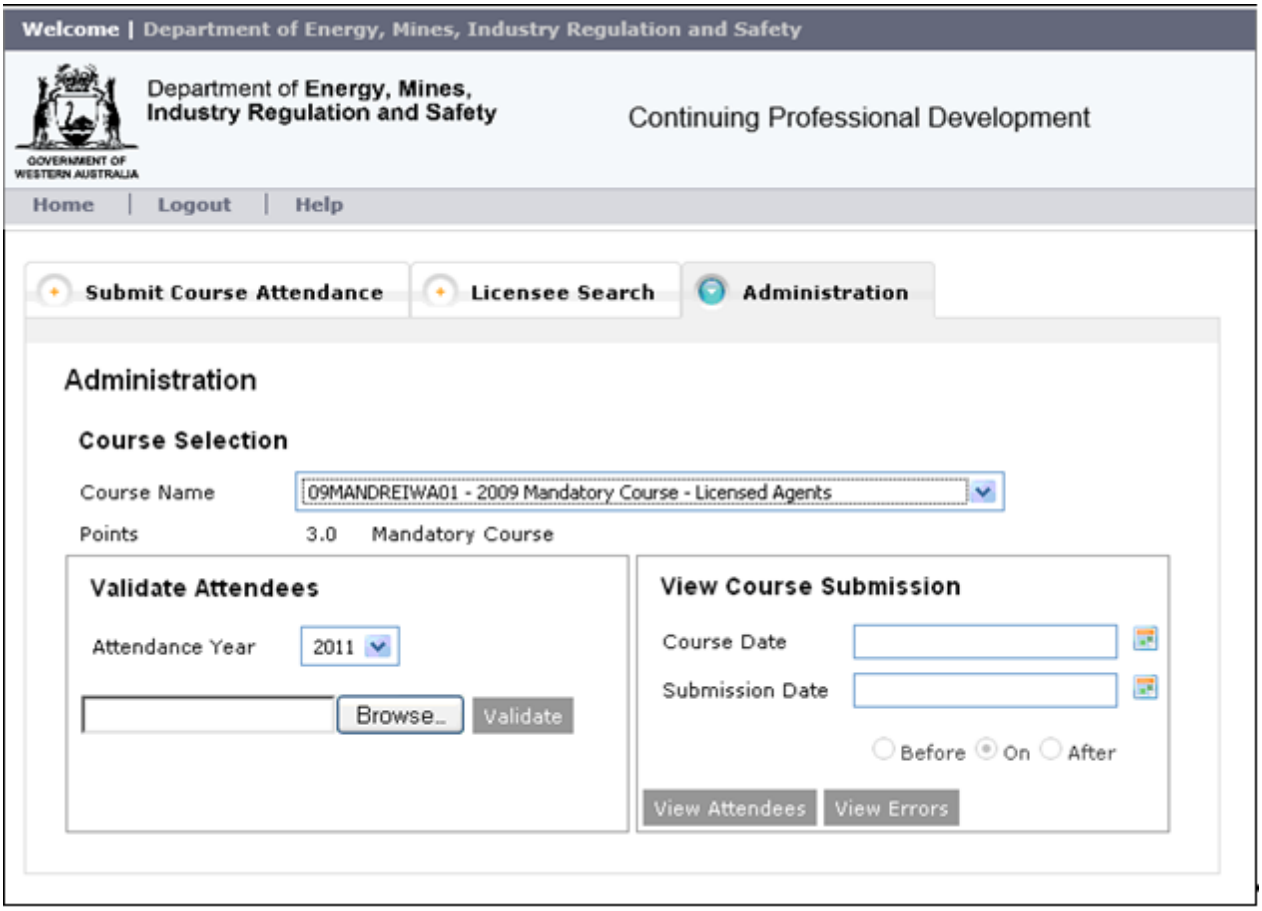
All record matches are on surname, first name, other name and licence number and will be displayed in licence name order.



5. Administration

This screen enables course providers to:

- validate a file upload to show errors and any restricted licensees or
- re-print a Course Attendance Receipt for any of their courses or
- view errors for course files previously submitted.



5.1 Selecting a Course

The system displays a dropdown list of approved courses in the ***Course Name*** field. Only the courses that have been approved to you are shown on the selection list. The list is sorted based on the ***Course Approval Number*** field.

The ***CPD Points*** and course type, ***Mandatory or Elective*** (and ***Category 4*** if applicable) will be displayed for the course selected.

The remainder of the Administration screen is divided into 2 parts:
Validate Attendees to pre-validate a file for upload
View Course Submission used to view/print a course attendance list for a previously submitted course or view errors from a previous file upload attempt

5.2 Validate Attendees

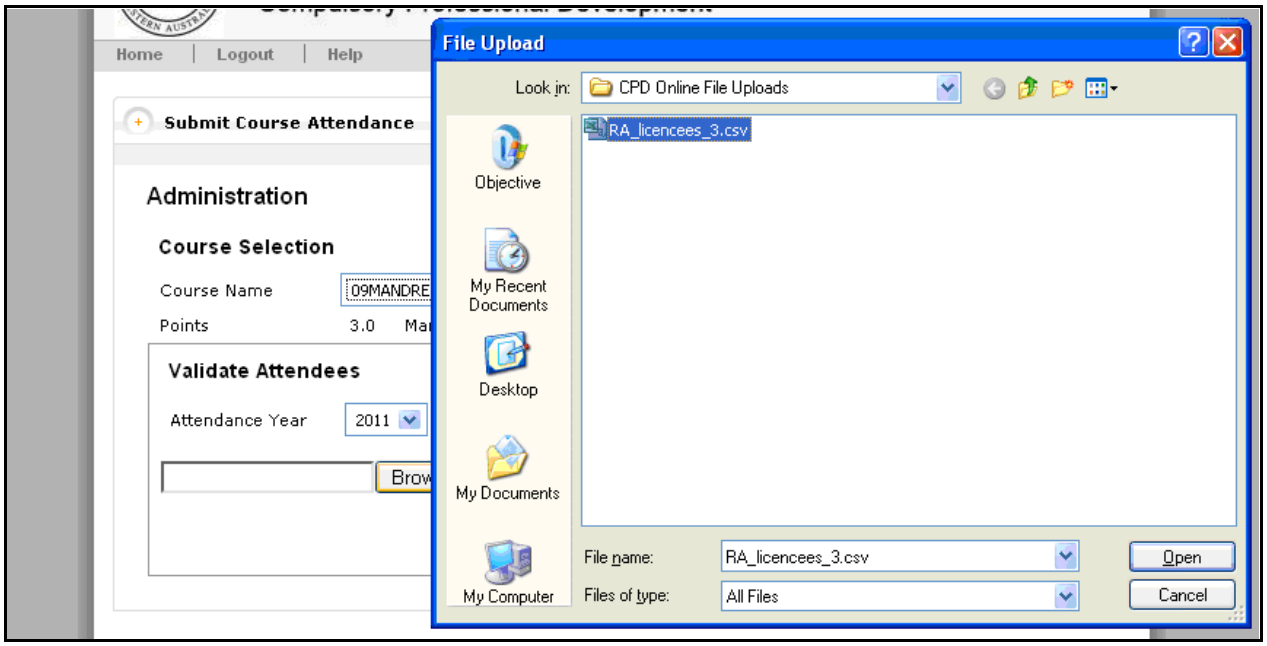
This function can be used to pre-validate a file of course attendees and will list all attendees in the file and show the following:

- Any errors for a licensee eg invalid licence number or invalid licence status
- Restricted status for a licensee
- Any Mandatory Courses already attended by a licensee

To validate a course attendance file (in csv format), browse to find the file on your pc:

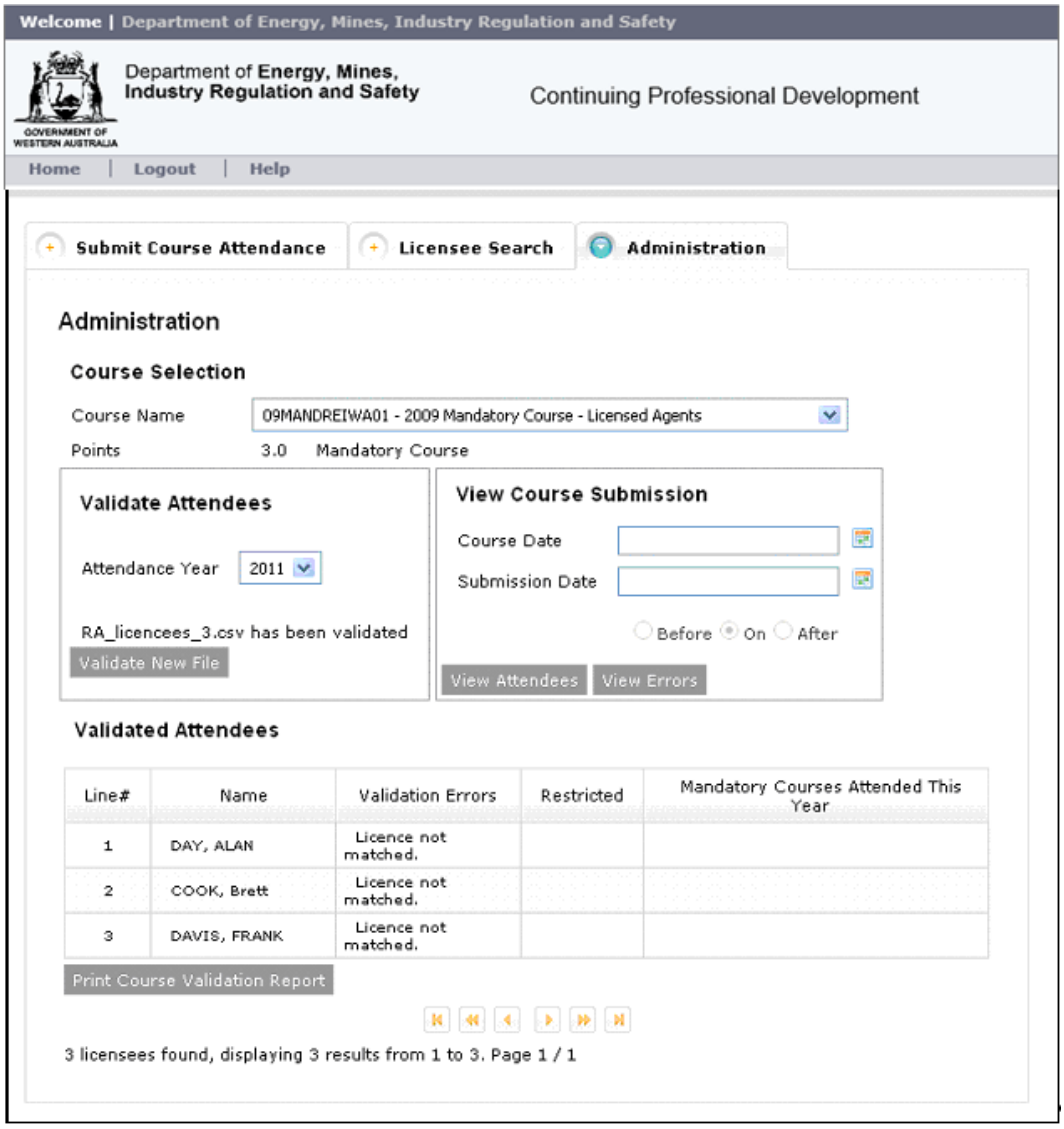
- Click on ***Browse*** button, in CPDOnline
- Choose file window opens
- Locate the file on your pc and click on the filename
- Click on the ***Open*** button

Click the ***Validate*** button to validate the selected file.

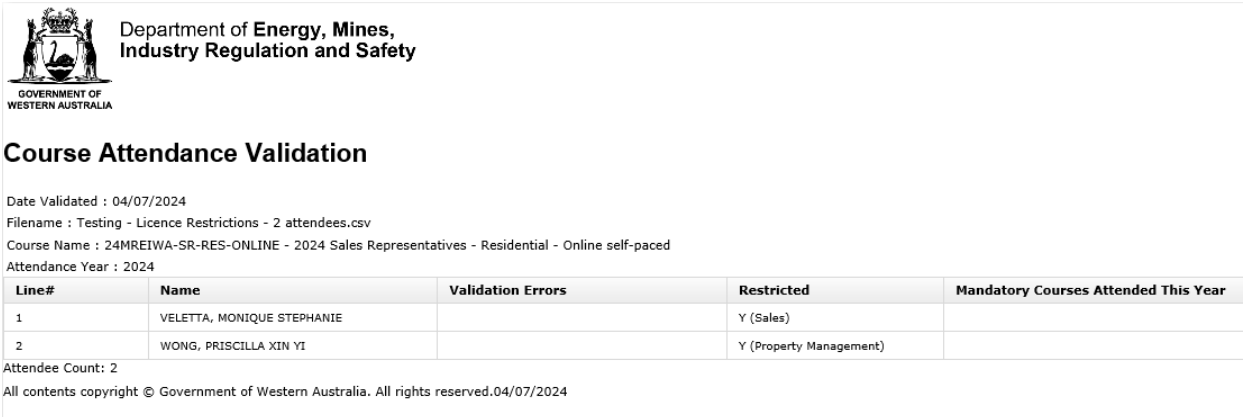


A validated attendee list displays, which shows validation errors, restricted licences and other mandatory courses attended (only if you initially selected a mandatory course for validation).

Licensees can only attend a limited number of mandatory courses in a calendar year. The **Validate** Attendees function uses the **Attendance Year** field to search for other mandatory courses attended in that year – attendance year defaults to the current year, but may be changed. Where other mandatory courses are attended, the attendance date displays - and course approval number (if it is a current Provider course) or a general designator (for different Provider course).



Click **Print Course Validation Report** button to print the validation details. Report will open in another window and can be printed using File ► Print.



5.3 View Attendees

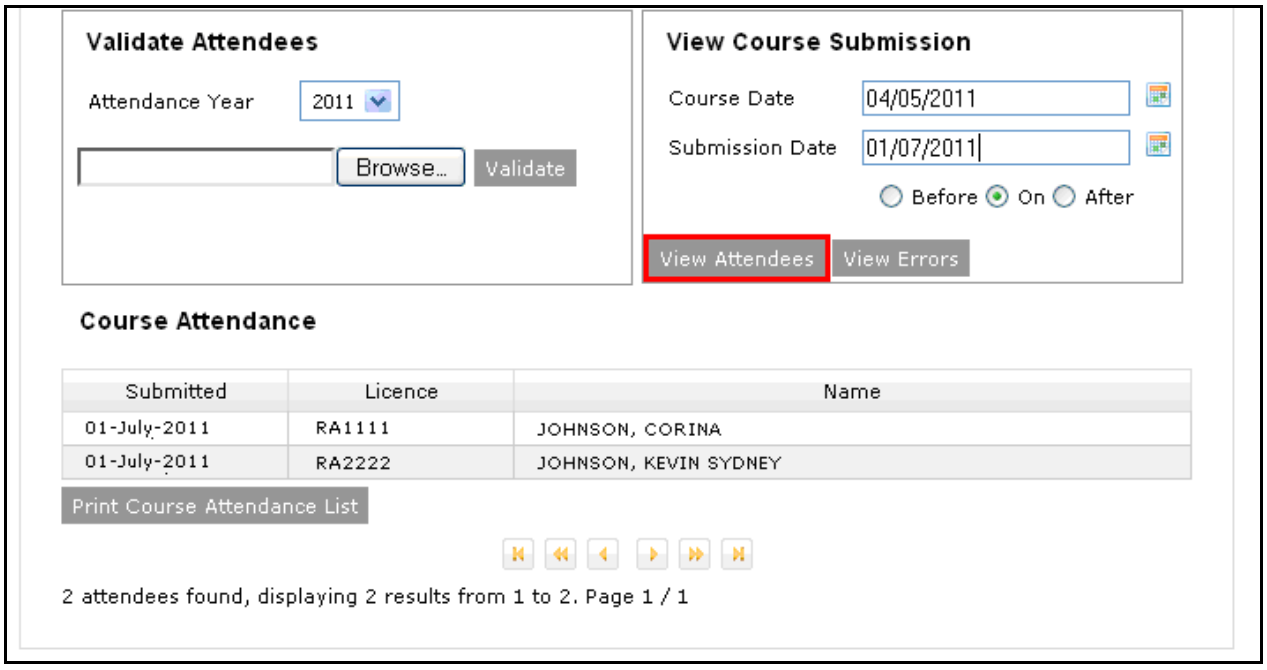
Selecting Dates

Course Date field is mandatory and the system will allow only past or current dates be selected. This is the date that the course was held. Dates can be entered or picked from the date picker grid display.

Submission Date field is optional and may be left blank. The Course search may be refined by selecting only course data that has been submitted before, on or after a specified date (submission date). Date can be entered or picked using the date picker.

View Attendees

Click on the ***View Attendees*** button to view a list of attendees for a specified course and date.



Click on the **Print Course Attendance List** button to obtain a Course Attendance Receipt, which can be printed using File ► Print.

Department of **Energy, Mines, Industry Regulation and Safety**

GOVERNMENT OF WESTERN AUSTRALIA

Course Attendance List

Course Provider : REAL ESTATE INSTITUTE OF WESTERN AUSTRALIA INC
Course Name : 24MREIWA-SR-RES-ONLINE - 2024 Sales Representatives - Residential - Online self-paced
CPD Points : 3.0
Mandatory : Y
Category 4 : N
Course Date : 01-Jul-2024

Licence	Attendee
RA1233	Hender, John

Attendee Count: 1

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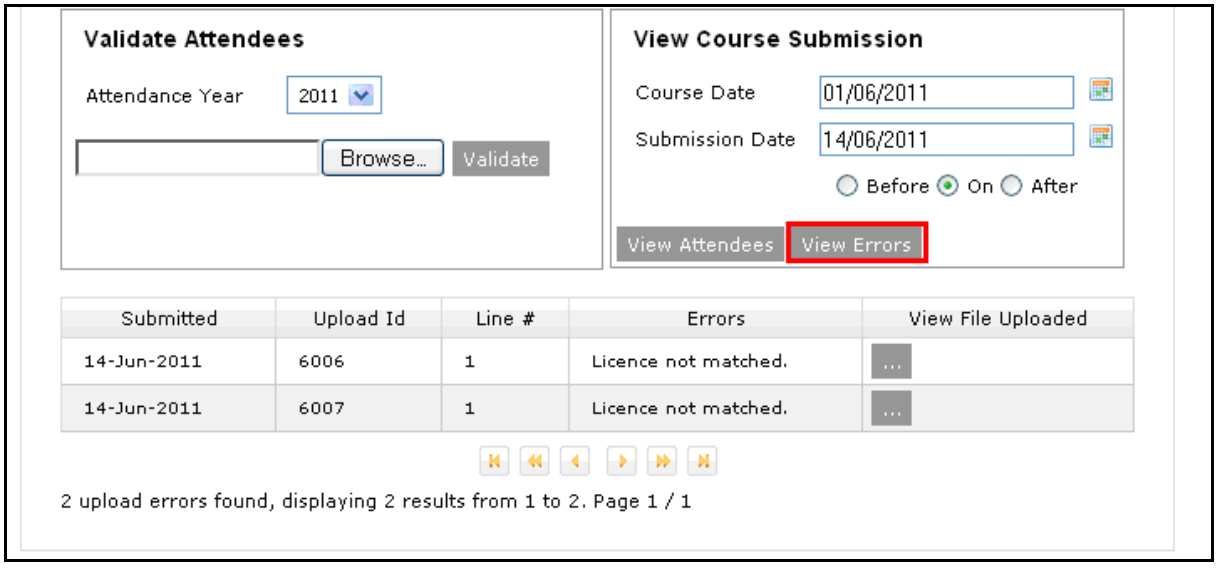
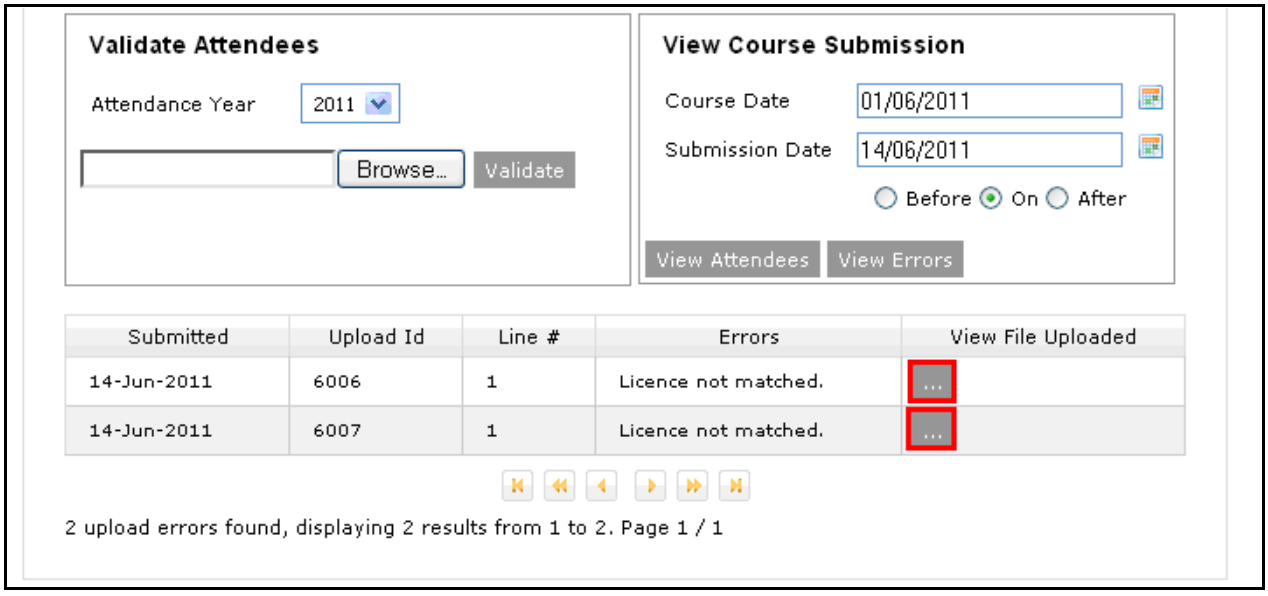
Note that if the receipt window does not pop up on your screen, it will be available to select, as a new explorer window, on the bottom task bar of your screen.

View Errors

Click on the ***View Errors*** button, to view a history of past file uploads for the specified course and course date. This display is available for 6 months after a file upload or attempted upload.



Click on ***View File Uploaded***, next to the required file to download a copy of the file.

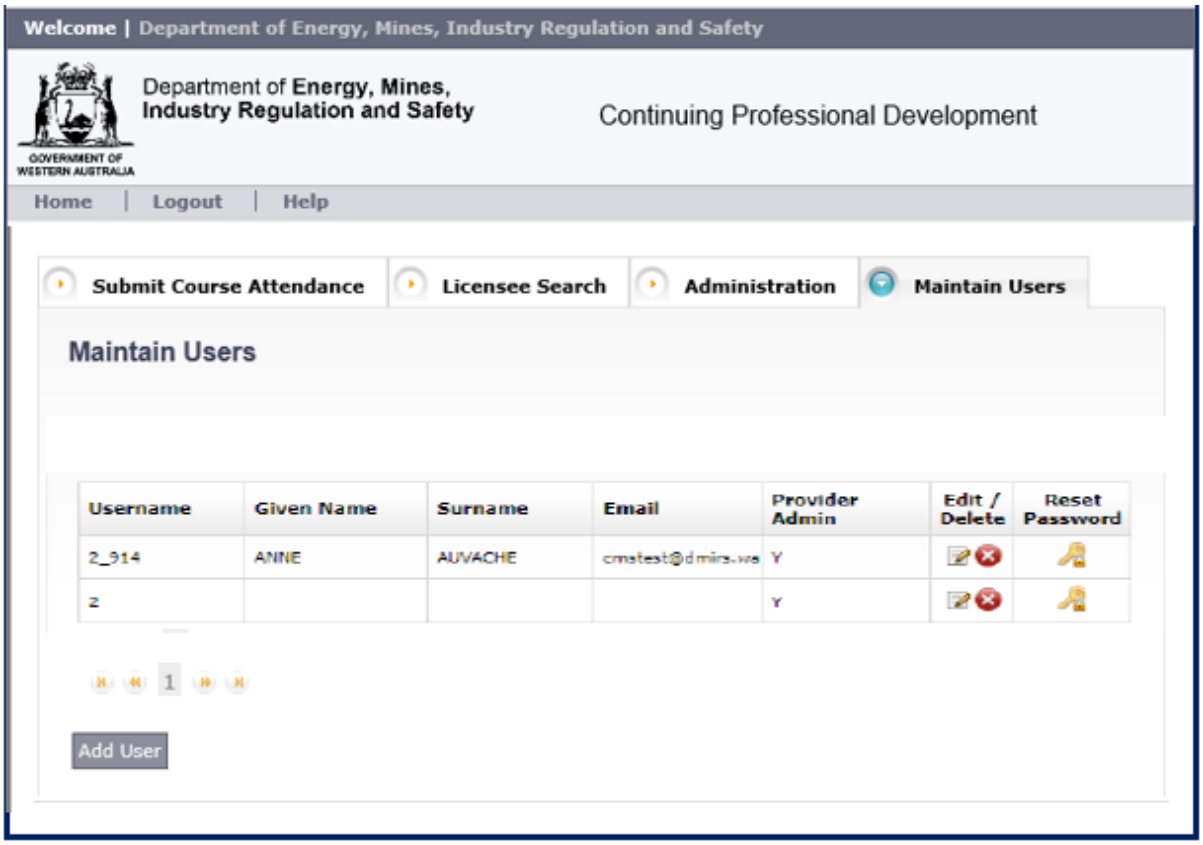


6. Maintain Users

The course providers selected Administrator will have access to the 'Maintain Users' tab. This screen enables them to:

Create, Add, Update, Edit (Pencil and paper icon) / Delete (cross in red spot) users; or
Reset Passwords (Key icon) under the 'Maintain Users' tab.

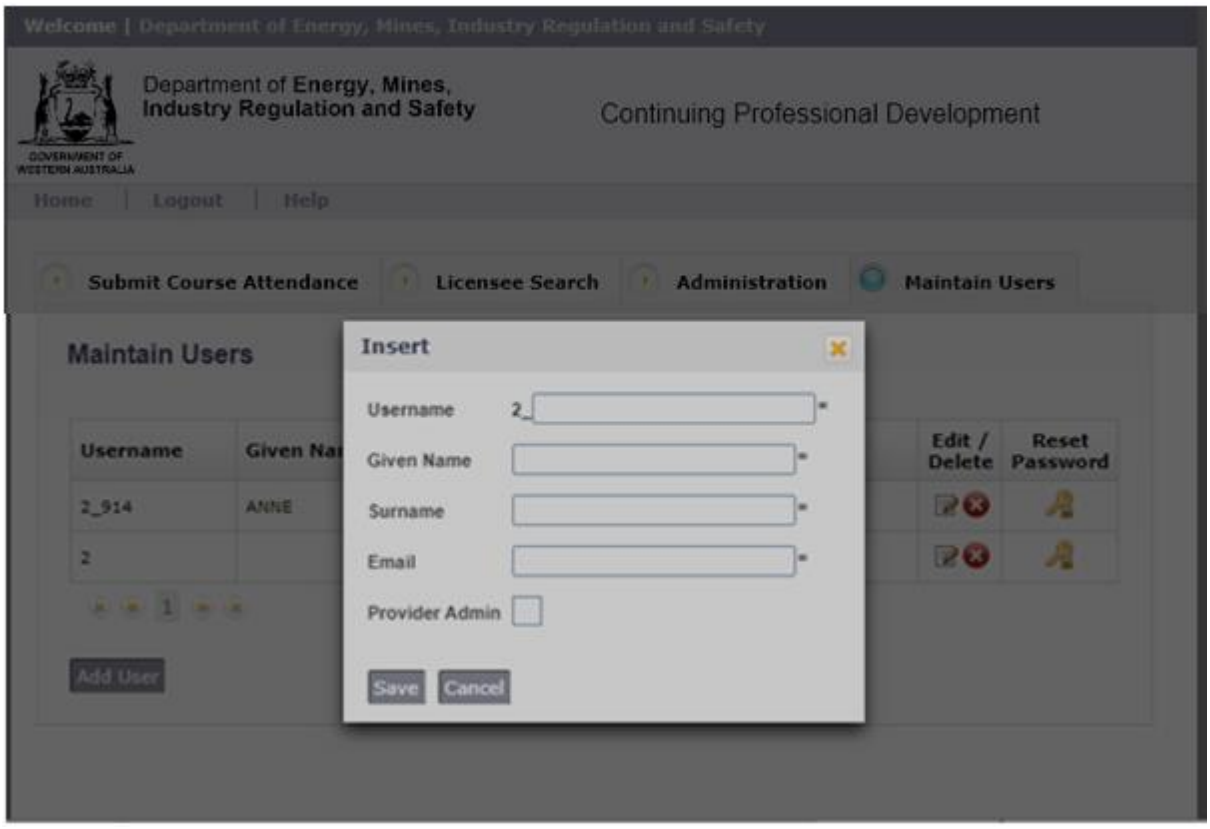
The selected Administrator will need to add their own details (Including their username, given name, surname, email address and whether they are the training provider's Administrator).



6.1 Add User

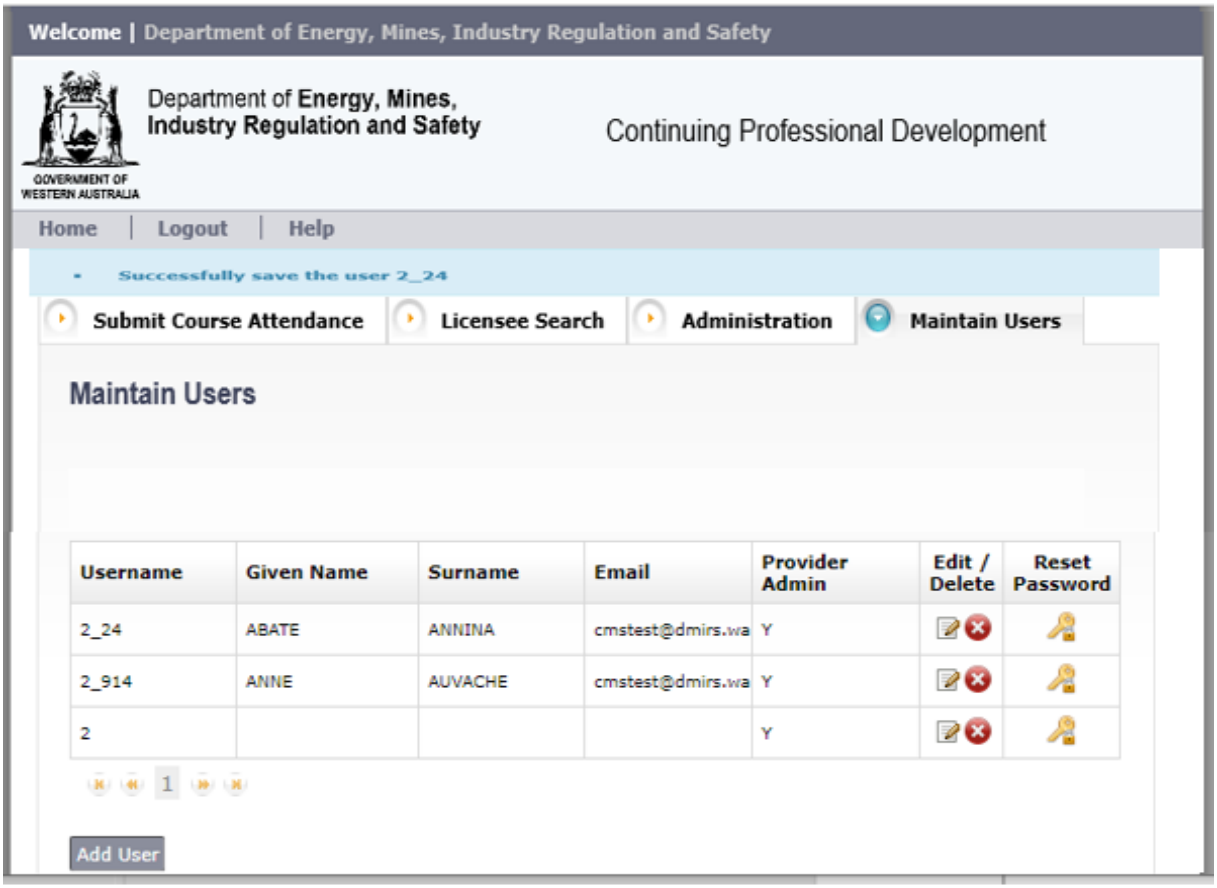
The Administrator can add users by clicking on the “Add User” button (On the left, just under the forward and back symbols highlighted in yellow).

They will be presented with a pop-up screen where they can enter other Users’ details within their organisation.



The Administrator can then add the other users’ details with all fields completed (If other users are not approved Administrators, don’t select check box in the “Provider Admin” field)

When the mandatory fields have been entered, save the record.



New users will receive an email to verify their email or email has a new password. They will need to select the link on the email to verify the new account. They will then be forced to create a new password.

Dear ANNE,

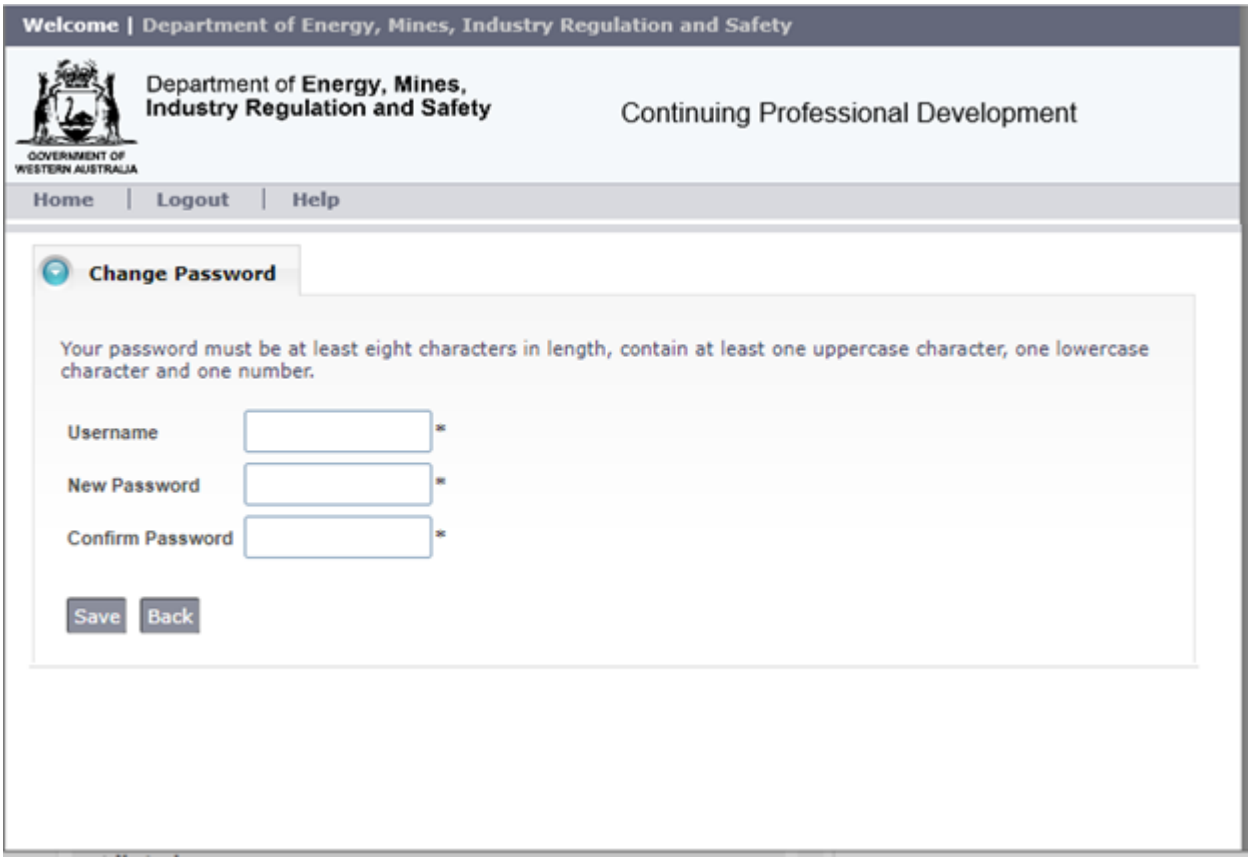
You have been granted access to the CPDOnline system at the Department of Mines, Industry Regulation and Safety.

Your CPDOnline username is **2_914**
Please click this link to create your CPDOnline password.

If you have any queries or require any further information, please contact the CPD Team on 08 6251 2719 or by email at cpd@dmirs.wa.gov.au

After clicking on the link, change password screen will be presented.

- Enter Username
- New password – This must be at least 8 characters in length, with at least one uppercase character, one lower case character, and one number
- Confirm password
- Save



If the new user is a training provider's approved Administrator, they will have access to the following tabs:

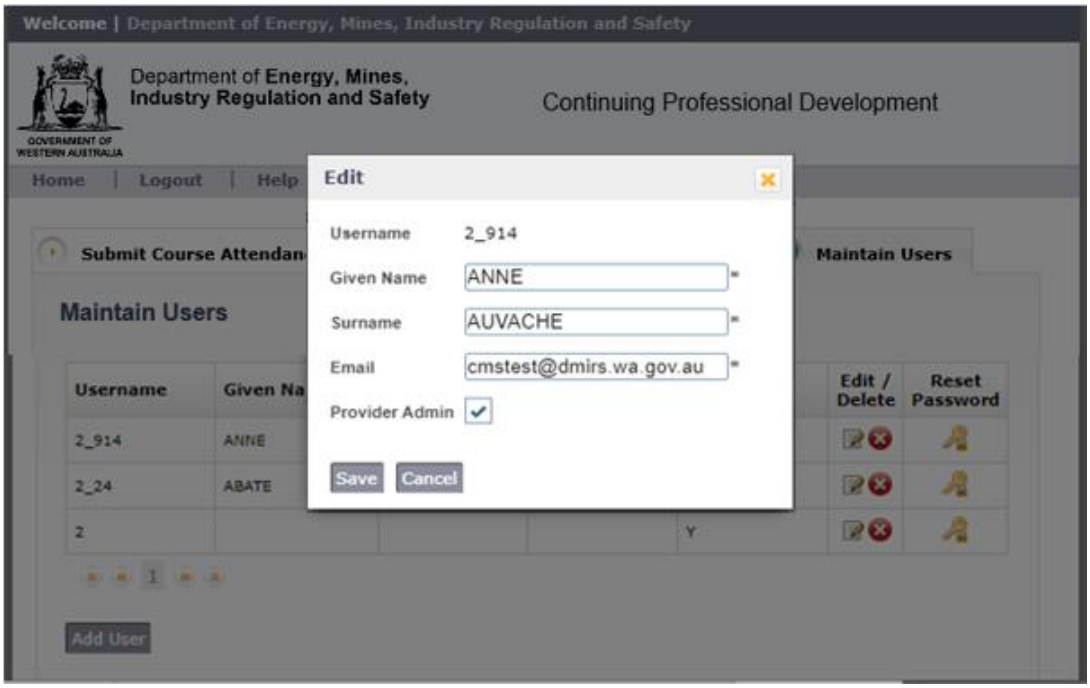
- Submit Course Attendance
- Licensee Search
- Administration
- Change Password
- Maintain Users

If the new user is not an Administrator, they will have access to the following tabs:

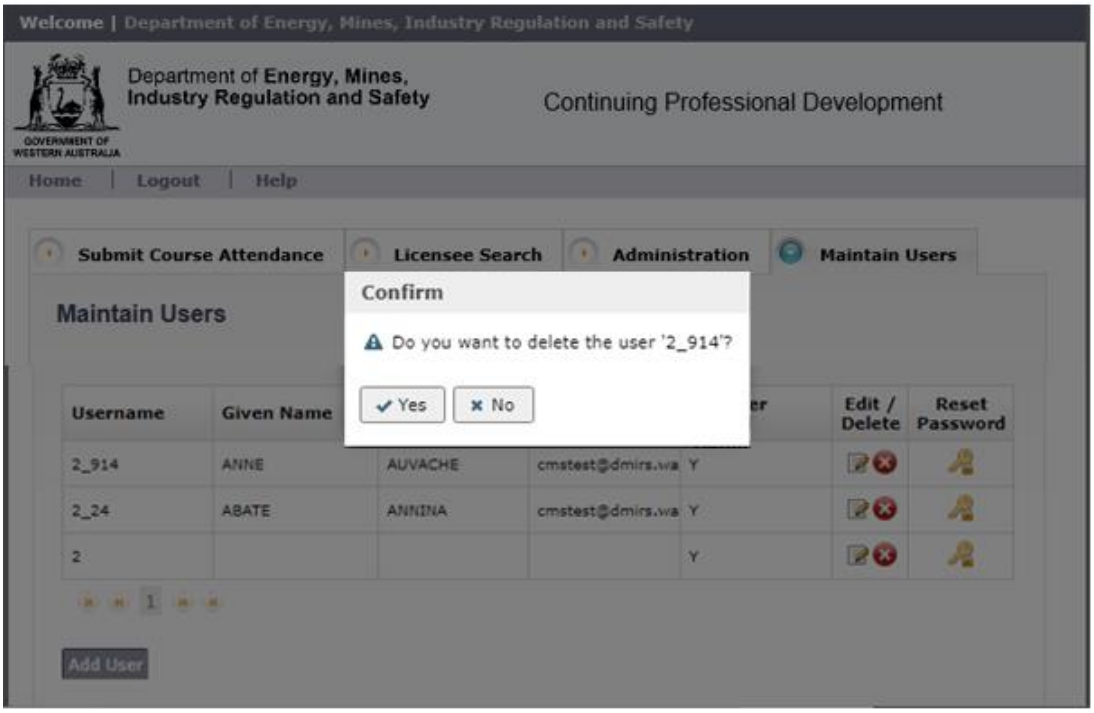
- Submit Course Attendance
- Licensee Search
- Administration

6.2 Edit/Delete User

The Administrator can edit details including username, given name, surname, email address and whether they are the training provider's Administrator.

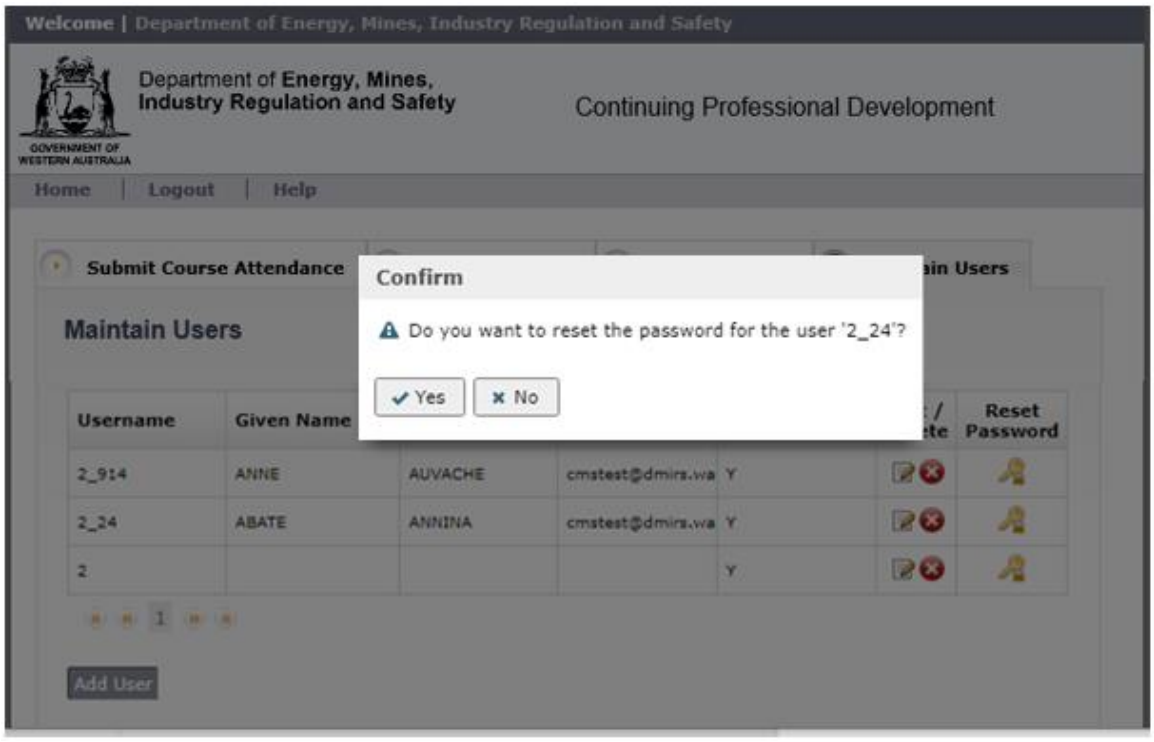


The course provider Administrator can delete users. Please note that this should be done when a user is no longer a staff member of the course provider.



6.3 Reset Password

The Administrator can reset password for users under the 'Maintain Users' tab.



- The user receives an email with reset password link.
- The user clicks on the link in the email and is required to reset their password.

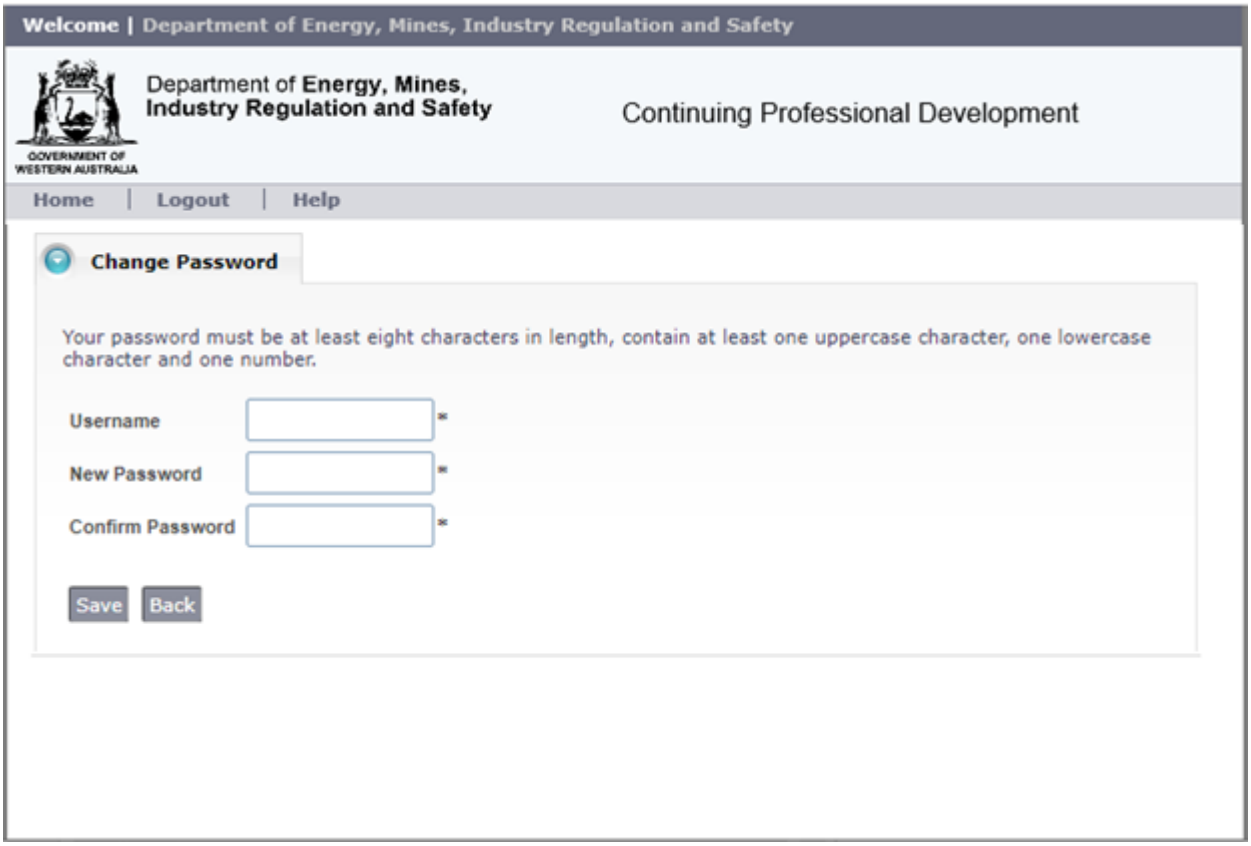
Dear ANNE,

Your CPDOnline username is **2_914**
Please click this link to reset your CPDOnline password.

If you have any queries or require any further information, please contact the CPD Team on 08 6251 2719 or by email at cpd@dmirs.wa.gov.au

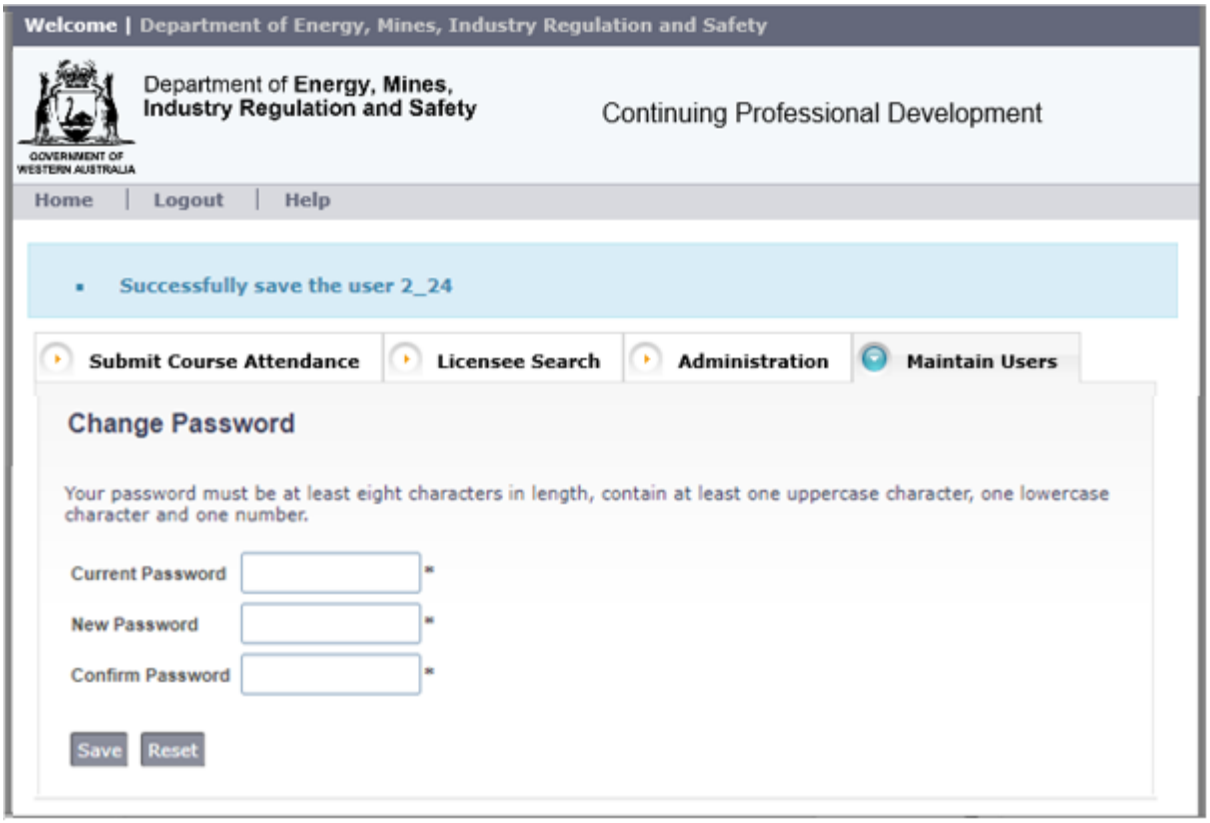
After clicking on link change password screen will be presented.

- Need to enter Current password
- New password – Must be at least 8 characters in length, with at least one uppercase character, one lower case character, and one number
- Confirm password
- Save



7. Change Password

- Navigate to Change Password tab
- Change password screen is presented
- Need to enter Current password
- New password – Must be at least 8 characters in length, with at least one uppercase character, one lower case character, and one number
- Confirm password
- Save



8. Logout

To logout, simply click on ***Logout*** in the screen header or simply close the internet browser window.

It is recommended that you select ***Logout*** link and then close the window.