Council for Estate Agencies (CEA)
Continuing Professional Development System
User Manual – Course Provider

Document Change History

Version	Date	Description
Version 1.0	23 Mar 2017	Initial release
Version 2.0	18 Aug 2017	Removed submission of attendance for core CPD activities by KEO/Authorised User and Salesperson
Version 3.0	18 Jan 2018	Added SingPass and CorpPass login option landing page and function to remove inactive trainer

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1. INTRODUCTION

"My CPD Portal" is a common platform to

- Allow course providers to introduce new courses and seek approval from CEA to conduct them;
- Keep course providers updated on their application status;
- Allow course providers to update course sessions and trainers for approved courses;
- Allow course providers to update core CPD attendance records;
- Allow Salespersons/KEOs to update non-core CPD attendance records;
- Allow Salespersons/KEOs to track their CPD requirement fulfilment status; and
- Allow KEOs to approve non-core CPD courses taken by their salespersons.

2. COURSE PROVIDER

The Course Providers can use this system to:

- Add new courses;
- Manage courses;
- Submit attendance records and course feedback records for completed courses; and
- Communicate with CEA administrators through an inbox correspondence system.

3. LOGIN

You can login to the CPD System via www.cea.gov.sg/cpd. Click on the login tab on the right side of top bar as shown below:

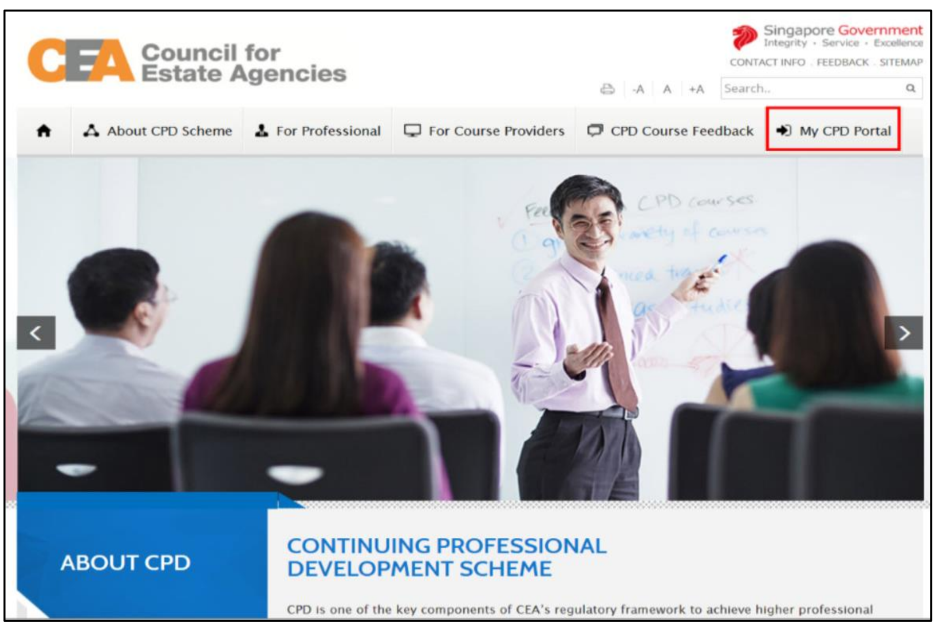


Figure 1: CPD Microsite – Login tab

Login option landing page will be displayed to choose to login with SingPass or CorpPass.

Figure 2: SingPass and CorpPass Login Option Landing Page

Choose SingPass for example, and key in your Singpass ID and Password as shown below:

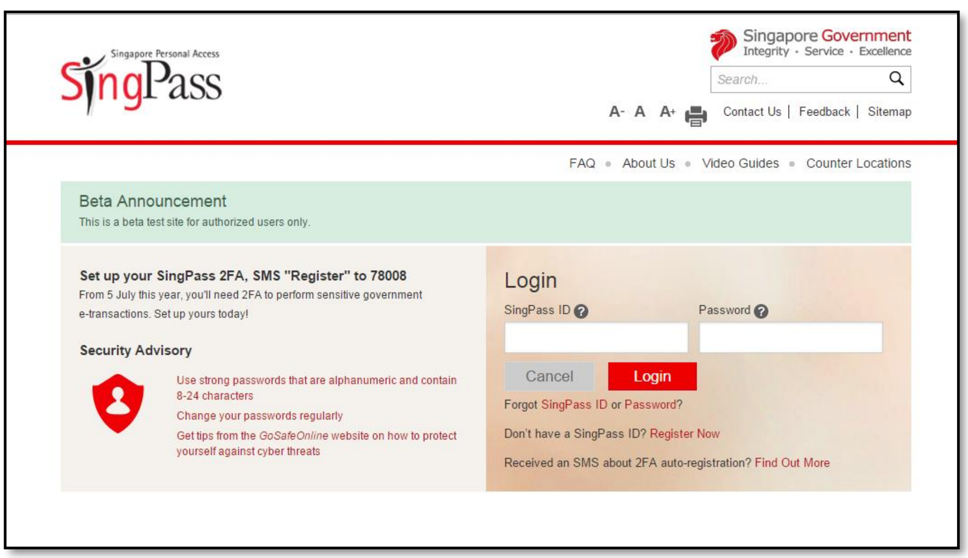


Figure 3: Singpass Login Page

Once logged in, you will see the dashboard below if you have multiple roles in the CPD System e.g. as KEO/ Authorised User or Salesperson. Otherwise please refer to **Figure 5** for the dashboard that you will see. For multi-role users, please select the "**Course Provider**" tab if you wish to log in as a **Course Provider**. You will be directed to the dashboard shown in **Figure 5**.

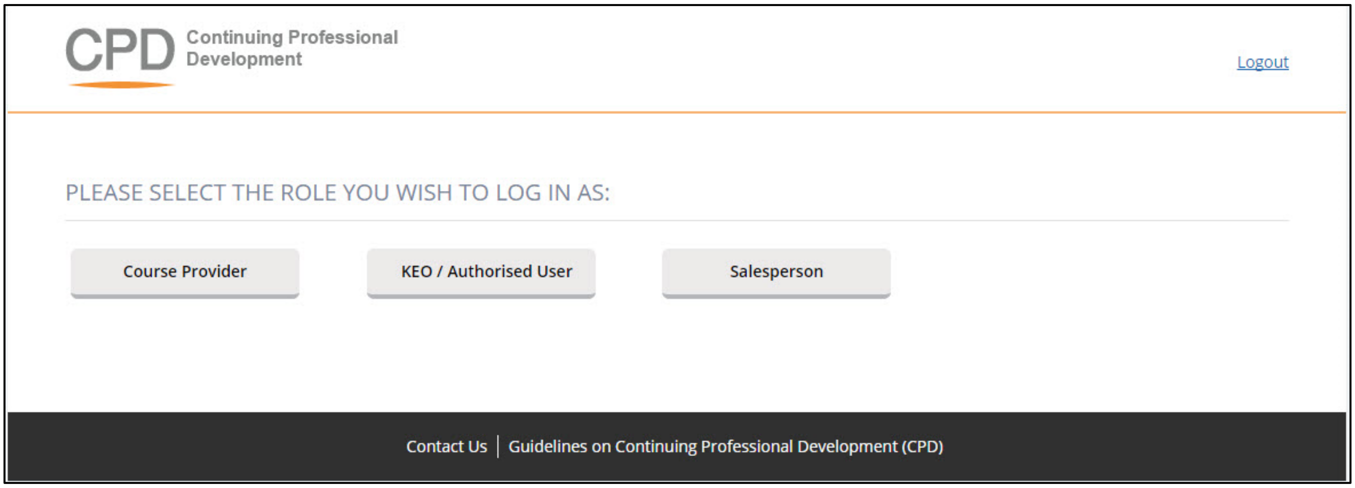


Figure 4: Multi Role dashboard

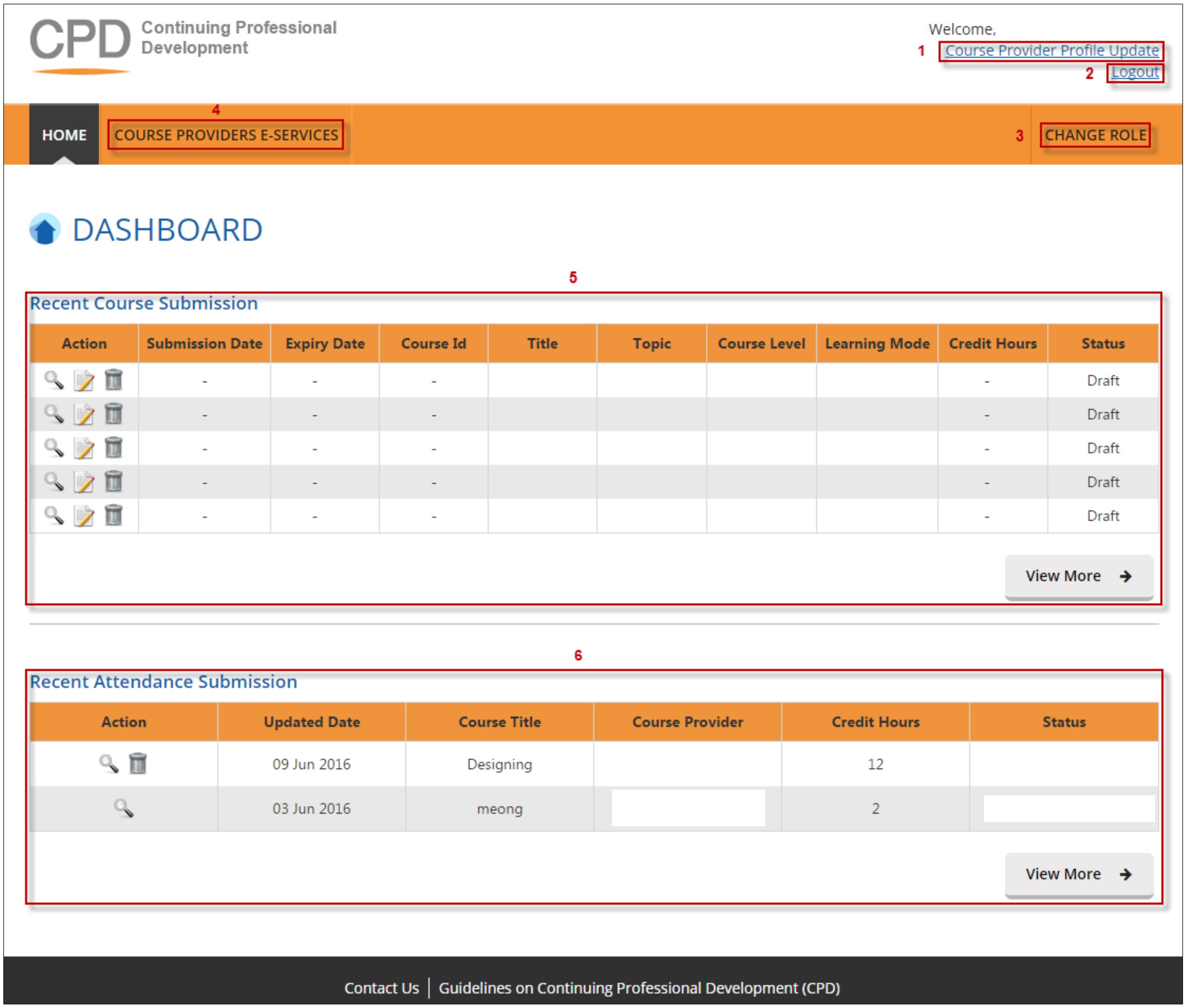


Figure 5: Course Provider Dashboard

Description:

1. **Course Provider Profile Update (Refer to Figure 6)**
   For changes to the organization and contact person details, please email to the Council for Estate Agencies (CEA) directly. To update the file on "Record Keeping Procedure", file formats that can be uploaded are .pdf, .doc, .docx, .xls, .xlsx, and .pptx with the maximum size of **5 MB**. By pressing **Save**, the changes will be saved in the system.

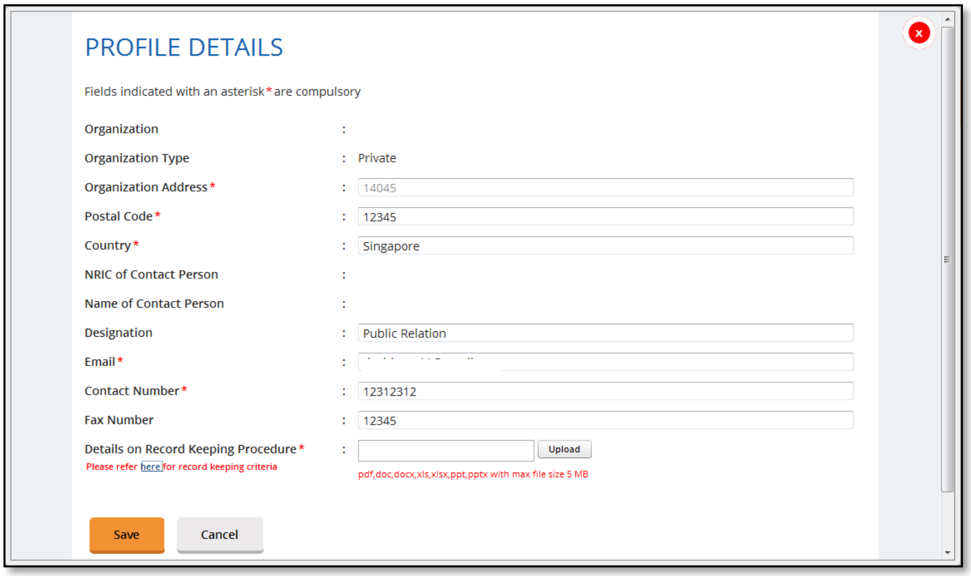


Figure 6: Course Provider Profile Update

2. **Logout**
   Click this link to log out from the system.
3. **Change Role**
   If you want to switch role, click this tab and you will be redirected back to the multi roles dashboard.
4. **Course Providers E-Services**
   Click this tab to check the list of e-services that are provided for Course Provider.
5. **Recent Course Submission**
   Display of recent course submission in a list. By clicking **View More**, you will be redirected to the course management page for Course Provider.
6. **Recent Attendance Submission**
   Display of recent attendance submission in a list. By clicking **View More**, you will be redirected to attendance management page for Course Provider.

3.1. Course Management

This chapter shows you how to manage the courses in the system. To access the Course Provider Management page, click **Course Providers E-Services >> Course Management**.

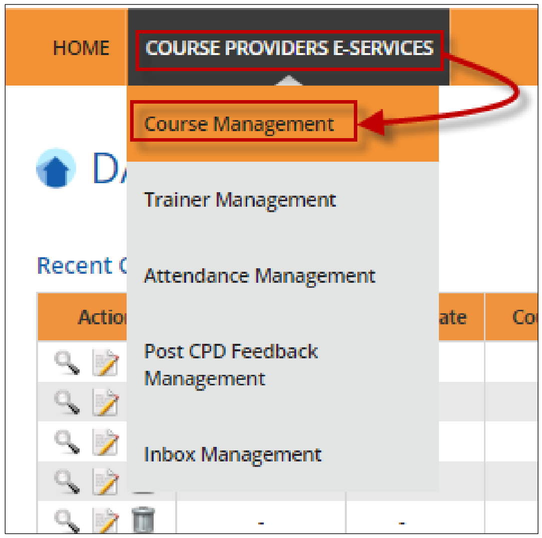


Figure 7: Course Providers E-Services tab drop-down menu: Course Management

You will be redirected to the Course Management page as shown below.

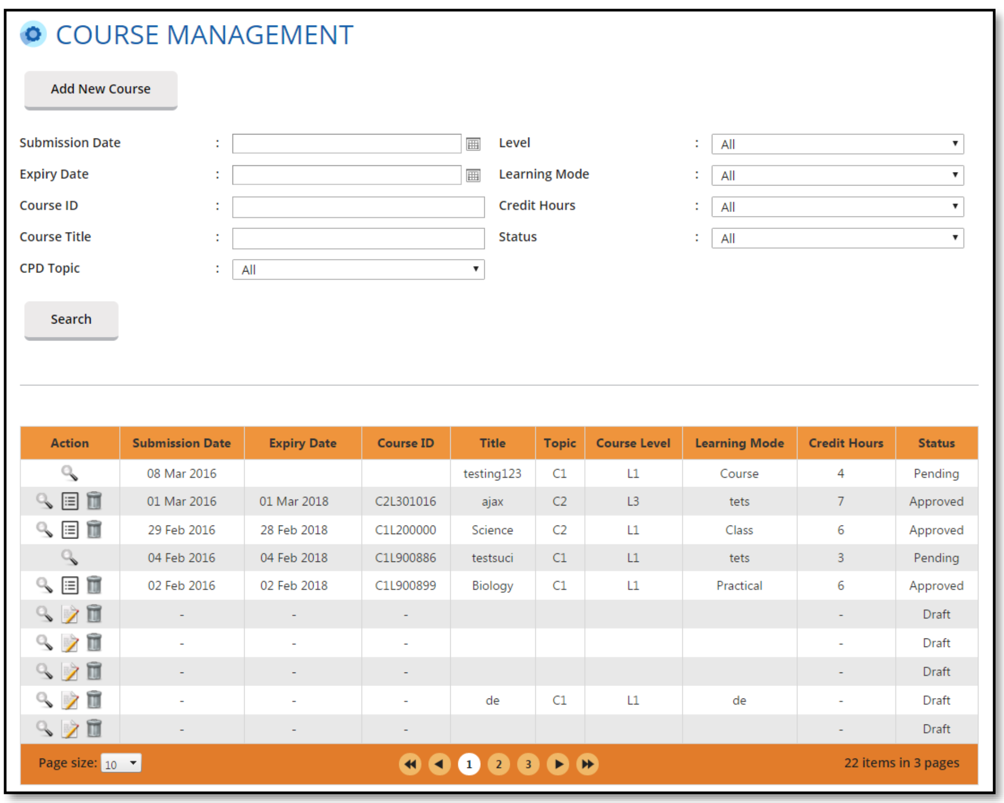


Figure 8: Course Management

3.1.1. Add New Course

To create a new course, click on the **Add Course** button then follow these steps below:

1. **Course Provider Details**
   Check that the details provided are updated and correct. If updating is required, please refer to Course Provider Profile Update on page 7.

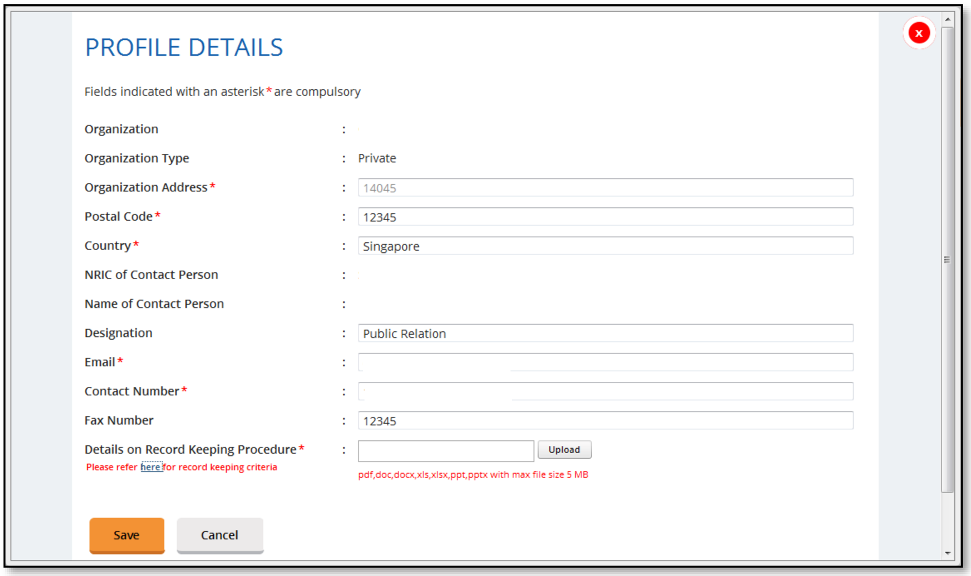


Figure 9: Course Provider Details

2. **Course Details**
   Click on **Course Details** tab, fill in all the fields and upload the course materials. The file should be in **.zip** with the maximum size of **10 MB**. Once done, click **Save** at the bottom of the screen. Tab with ✔ icon means that all of the required information on that page is already completed, while the uncompleted information page is marked with ✖ icon.

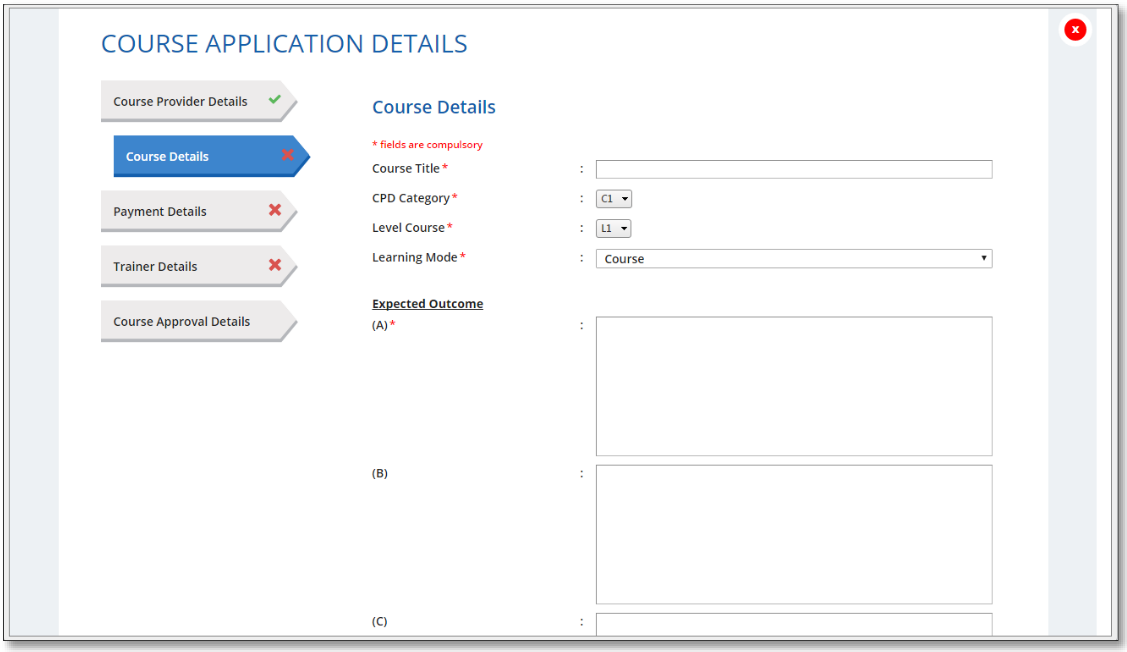


Figure 10: Create new course

3. **Payment Details**
Click on **Payment Details** tab, choose the payment mode from the drop-down list. Fill in all the fields. Attach a copy of the transaction payment details. The allowed file formats are .jpg, .jpeg, .png, .doc, .docx, .xls, .xlsx, .pdf with a maximum file size of **5 MB**. Once done, click **Save** at the bottom of the screen.

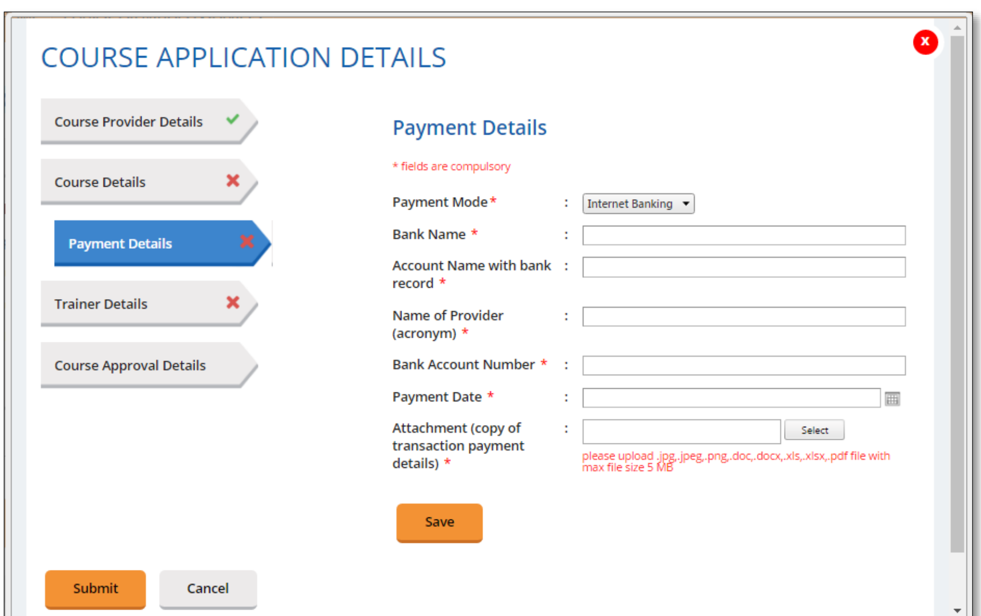


Figure 11: Payment Mode drop-down menu – Internet Banking

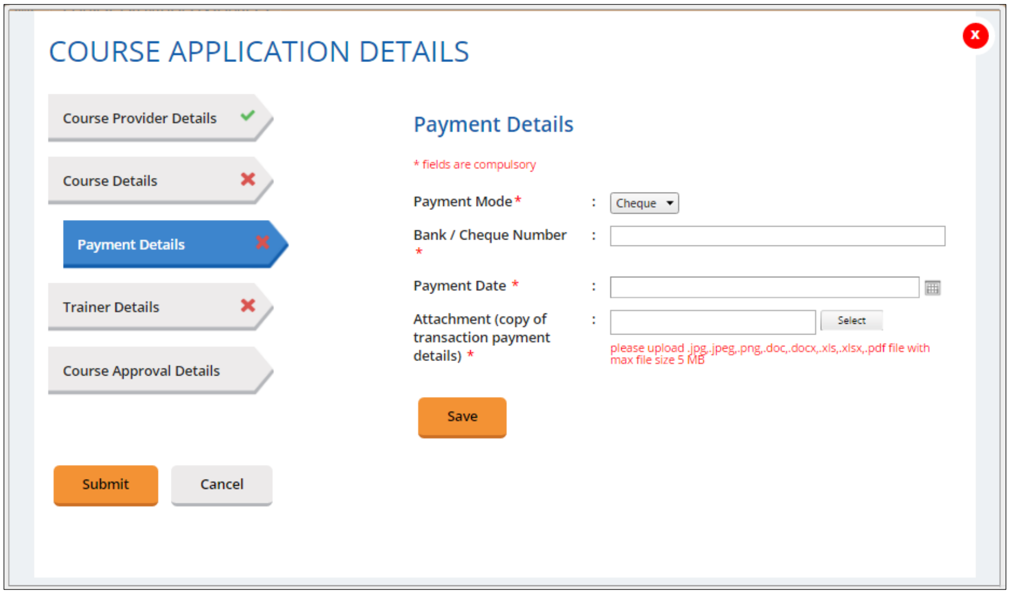


Figure 12: Payment Mode drop-down menu – Cheque

4. **Trainer Details**
To add trainer, click on **Trainer Details** tab and follow these steps.

1. **Select trainer**
Choose the trainer from the drop-down list of trainers that had already been added.

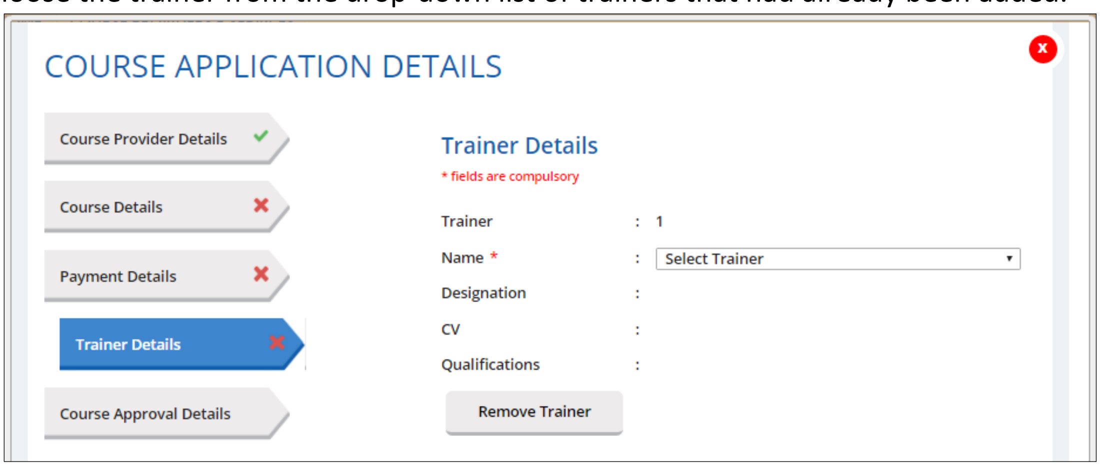


Figure 13: Add Trainer

2. **Add more than 1 (one) trainer**
If you want to add more than 1 trainer for this course, click on the "Add New Trainer" again. The maximum number of trainers allowed is **8 trainers**.

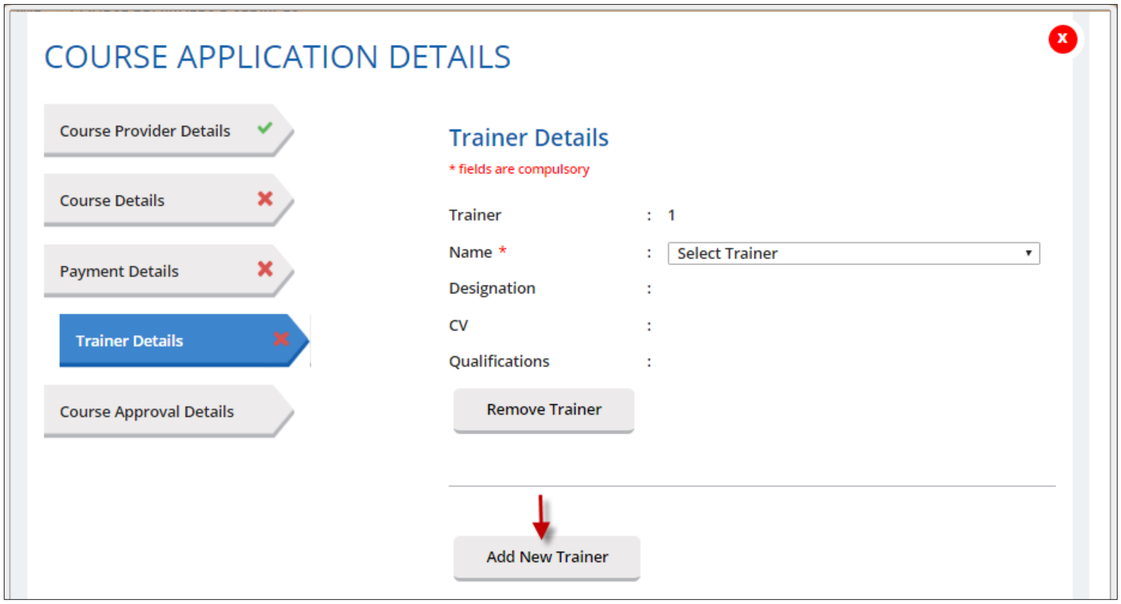


Figure 14: Add more than 1 (one) trainer

3. **Remove Trainer**
   Click on **Remove Trainer** to remove trainer record from the course.

4. **Save**
   Click **Save** at the bottom of the pop-up to save the trainer details in the system. At this phase, the course approval status is **Draft** and can be edited. Please refer to Para 3.1.4 on steps to edit the course.

5. **Submit**
   Once you click **Submit,** the course submission will be sent to CEA for approval and the course info cannot be edited.

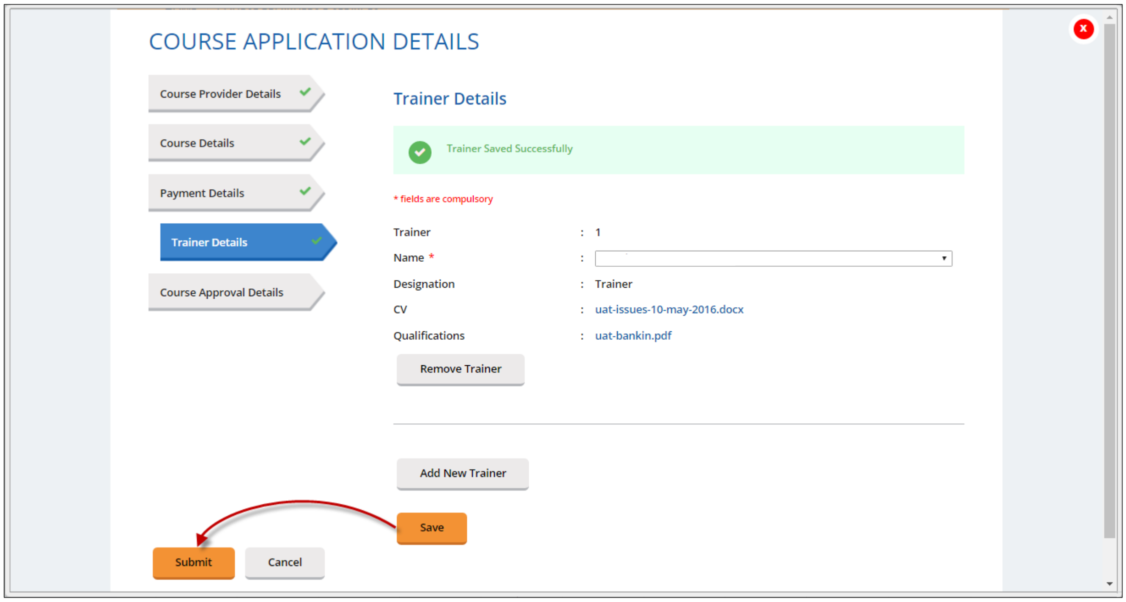
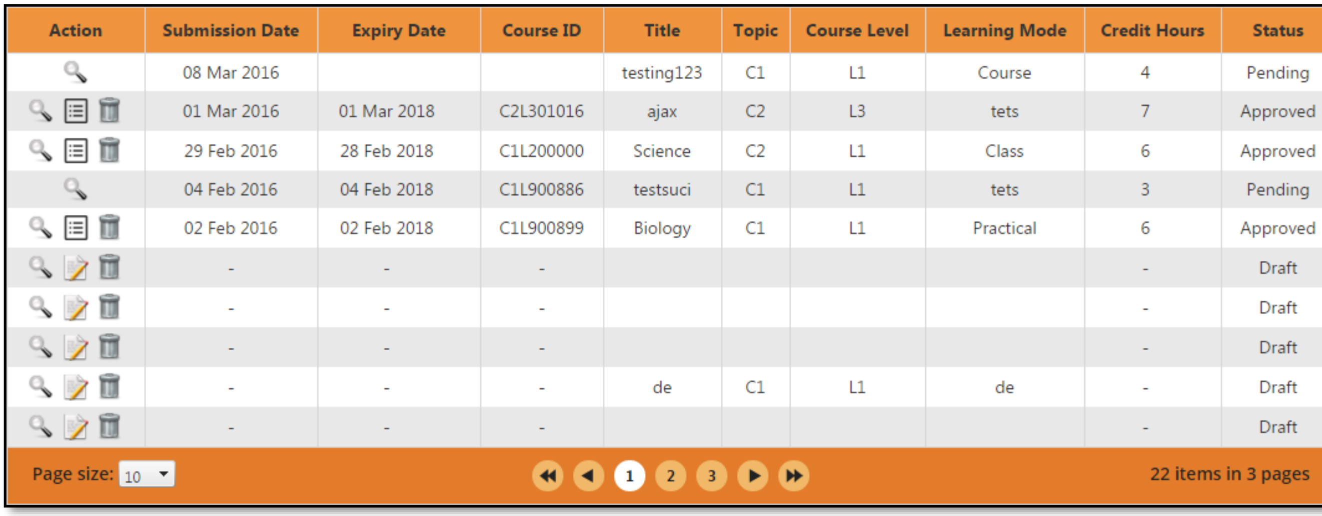


Figure 15: Trainer Details

When a new course is submitted, the approval status is indicated as **Pending**. It will be changed to **"Approved**" once the course is approved, or **"Rejected"** if it is rejected by CEA.

Figure 16: Course Approval Details for New Course Submission

The course record will be displayed at the course listing table as shown below.



Action	Submission Date	Expiry Date	Course ID	Title	Topic	Course Level	Learning Mode	Credit Hours	Status
	08 Mar 2016			testing123	C1	L1	Course	4	Pending
	01 Mar 2016	01 Mar 2018	C2L301016	ajax	C2	L3	tets	7	Approved
	29 Feb 2016	28 Feb 2018	C1L200000	Science	C2	L1	Class	6	Approved
	04 Feb 2016	04 Feb 2018	C1L900886	testsuci	C1	L1	tets	3	Pending
	02 Feb 2016	02 Feb 2018	C1L900899	Biology	C1	L1	Practical	6	Approved
	-	-	-					-	Draft
	-	-	-					-	Draft
	-	-	-					-	Draft
	-	-	-	de	C1	L1	de	-	Draft
	-	-	-					-	Draft

Page size: 10 1 2 3 22 items in 3 pages

Figure 17: Course listing

3.1.2. **Search Course**

Course Provider will be able for search courses using the following filters:

- Submission Date
- Expiry Date
- Course ID
- Course Title
- CPD Topic
- Level
- Learning Mode
- Credit Hours
- Status

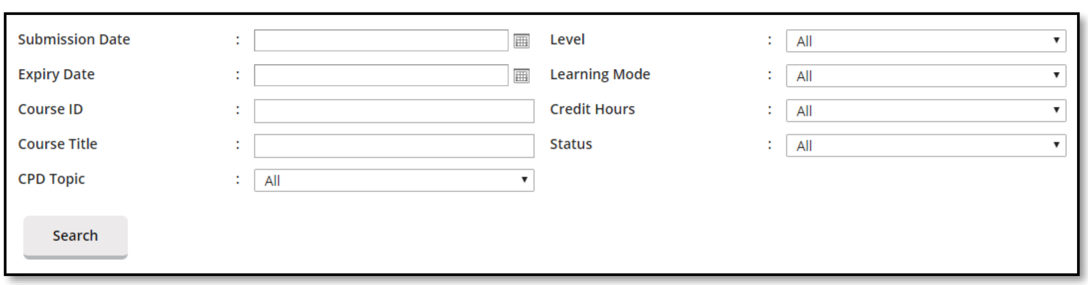


Figure 18: Course Management: Search form

Choose at least one filter in the search form, and fill the field. Click on **Search** button to get the results.

3.1.3. **View Course**

Course Provider will be able to view their course details by clicking on icon beside the record.

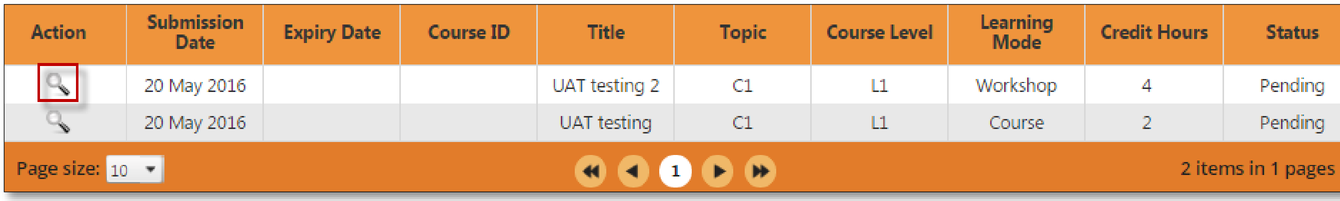


Figure 19: Course Management: Listing Table

The course details will appear as shown below:

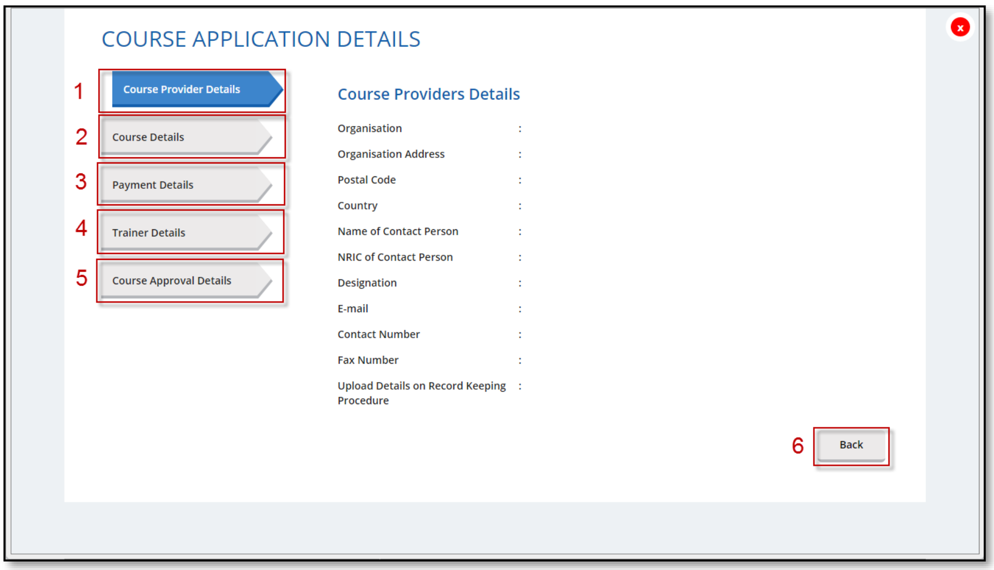


Figure 20: Course Management: Course details pop-up

Description:

1. **Course Provider Details**
   Contains details of the course provider that submits the course.
2. **Course Details**
   Contains details of the course.
3. **Payment Details**
   Contains information about payment details of the course.
4. **Trainer Details**
   Displays trainer information who is conducting the course.
5. **Course Approval Details**
   Displays approval details of the course.
6. **Back**
   Click this button to close the pop-up or click on button at the top right side of the pop-up.

3.1.4. Editing a Course that has been saved but not submitted yet

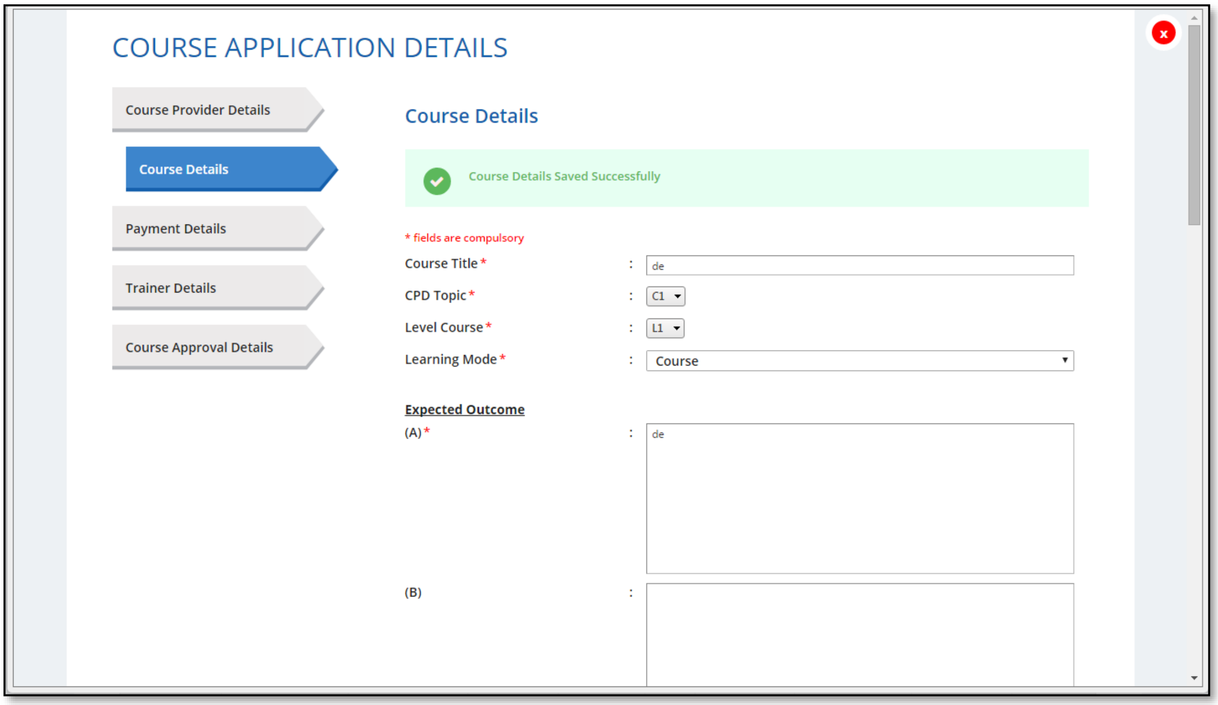


Figure 21: Edit course draft

1. **Edit course application details**
   Course Provider is able to edit **Course, Payment and Trainer details**.
2. **Save**
   Click **Save** at the bottom of the pop-up to save the course details.
3. **Submit**
   Once you click **Submit,** the course submission will be sent to CEA to get approval and the course cannot be edited.

3.1.5. Delete Course

To delete course record, click on icon beside the record. This action is only allowed for course with **Draft** and **Approved** status.

	02 Feb 2016	02 Feb 2018	C1L900899	Biology	C1	L1	Practical	6	Approved
	-	-	-	de	C1	L1	de	-	Draft

Figure 22: Draft and Course List

Then confirmation pop-up will appear as shown below.

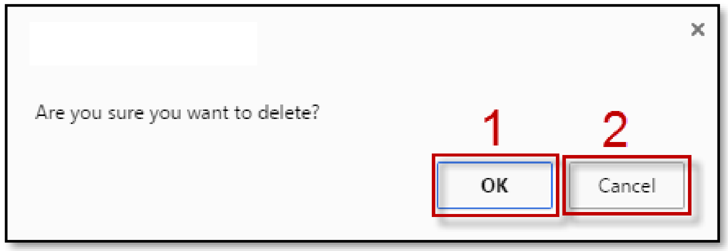


Figure 23: Delete course - Confirmation pop-up

Description:

1. **OK**
   Click this button if you want to delete the course record from the system.
2. **Cancel**
   Click this button if you do not want to delete the course, pop-up will be closed.

3.2. Session Management

On this page, Course Provider will be able to manage the session for each course that has been submitted. New sessions created will appear in the CPD Course Directory in the CPD Microsite, therefore sessions should be created before the conduct of the course.

3.2.1. Add New Session

To add new session, click on icon beside course record at course listing. The following page will appear.

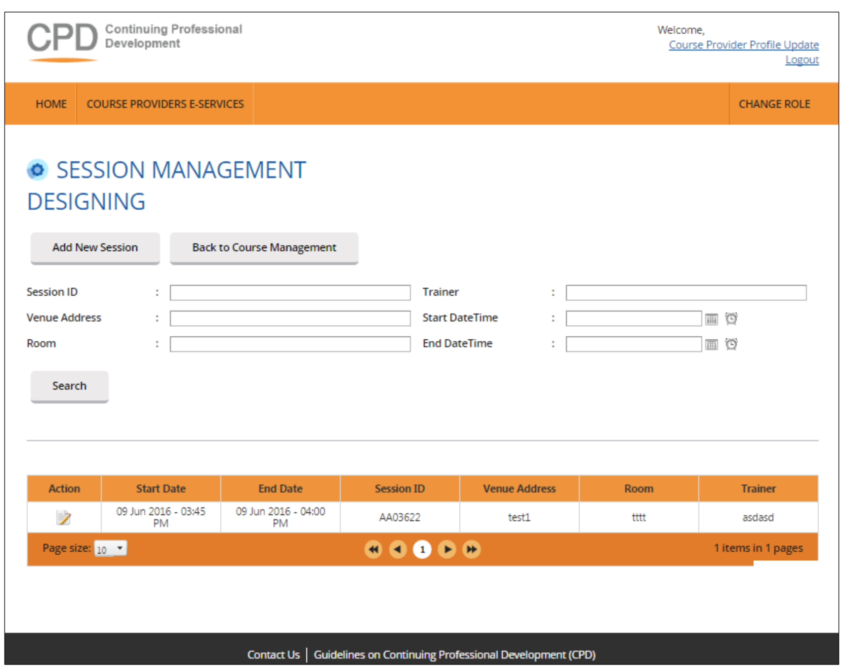


Figure 24: Session Management

To create new session, click **Add New Session** button, then this following pop-up will appear.

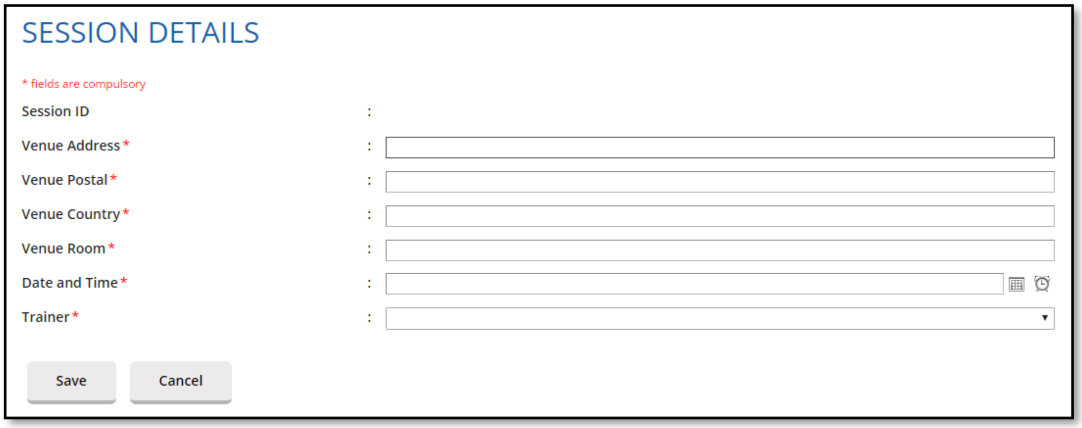


Figure 25: Add New Session

All fields must be filled, and **Session ID will be auto generated by the system.** Once the respective session details are filled, click **Save** to save the session record into the system or **Cancel** to discard the session.

3.2.2. **Search Session**

Course Provider will be able to search the course record by using the following filters:

- Session ID
- Venue Address
- Room
- Trainer
- Date & Time

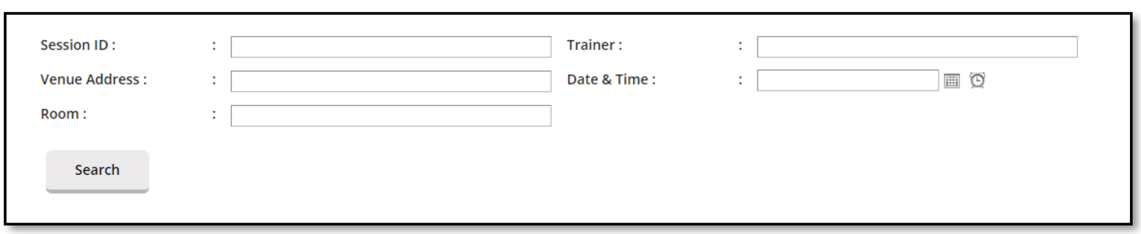


Figure 26: Session Management: Search form

Description:

1. **Search filters**
   Choose at least one filter in the search form, then fill in the relevant details in field.
2. **Search**
   Click on Search button to get search result.

3.2.3. **Update Session**

Course Provider is able to update session details by clicking on icon near the session record. On the Session Detail pop-up, all fields can be updated, except for Session ID. Click **Save** once you are done.

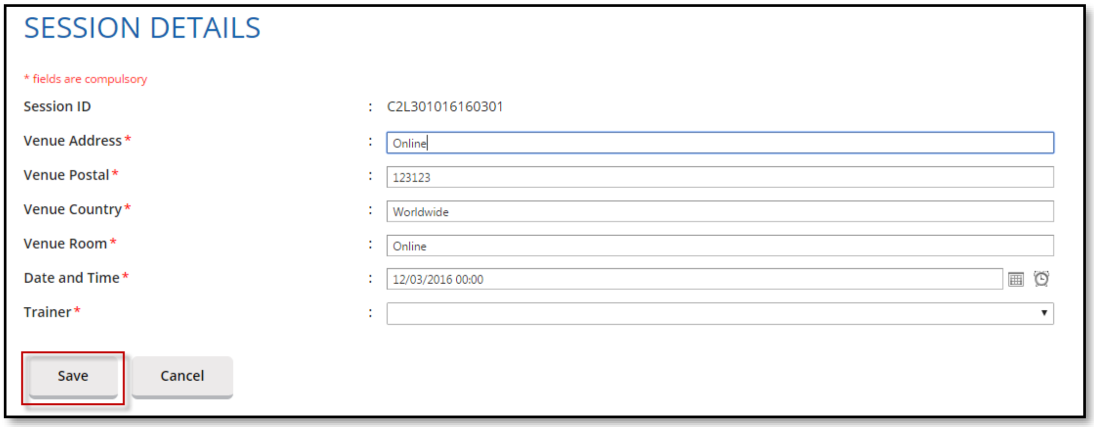


Figure 27: Update Session Details

3.2.4. **Delete Session**

To delete the session record, click on icon beside the record. This action is only allowed for upcoming course session. Then confirmation pop-up will appear as below.

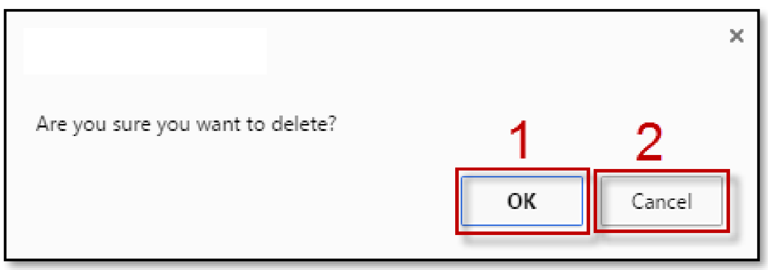


Figure 28: Delete session - Confirmation pop-up

Description:

1. **OK**
   Click this button if you want to delete the session record from the system.
2. **Cancel**
   Click this button if do not want delete the session, then the pop-up will be closed.

3.2.5. **Back to Course Management**

Click this button to go back to Course Management page.

3.3. Trainer Management

This chapter shows you how to manage the records of the trainers in the system. To access the Trainer Management page, click **Course Providers E-Services >> Trainer Management**.

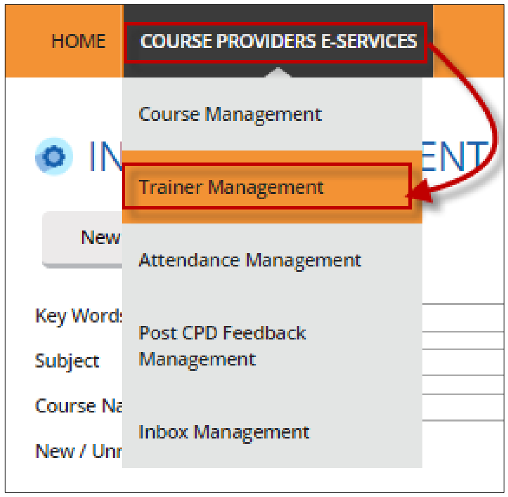


Figure 29: Course Providers E-Services tab drop-down menu: Trainer Management

You will be redirected to Course Management page as shown below.

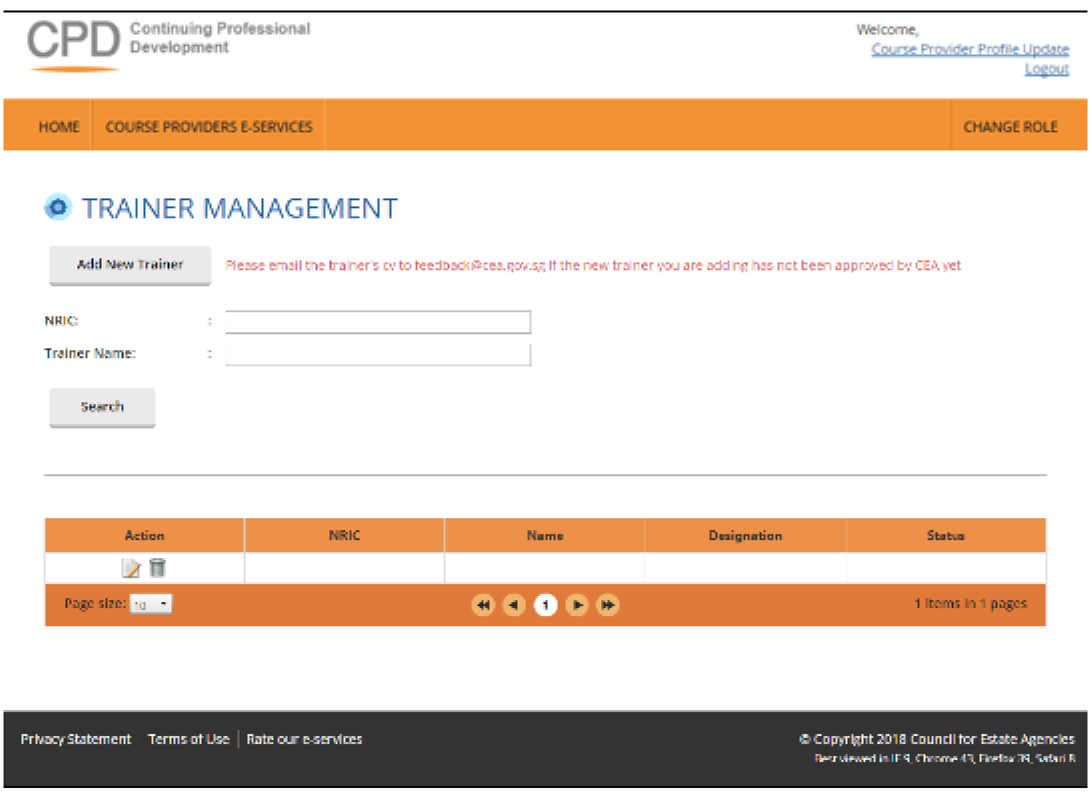
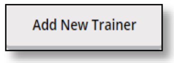


Figure 30: Trainer Management

3.3.1. Add New Trainer

Click on **Add New Trainer** button  and you will see the following pop-up:

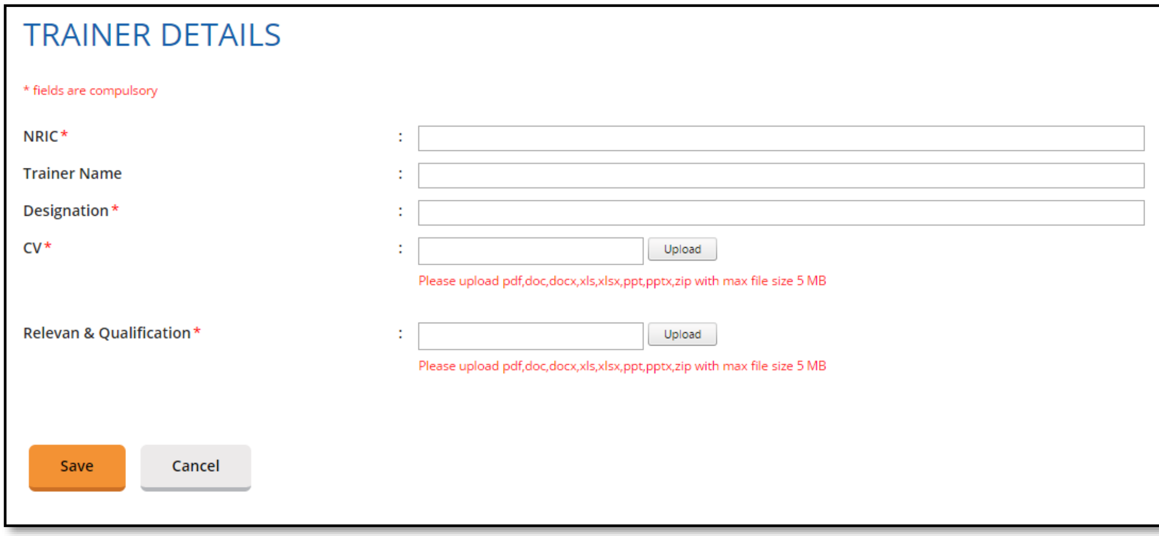


Figure 31: Create new trainer

All fields must be filled and the attached document must be in one of the following formats: .pdf, .doc, .docx, .xls, .xlsx,.ppt, .pptx, .zip with maximum file size of **5 MB**. Once done, click **Save** and the new trainer will be displayed at the trainer list as shown below.

Figure 32: Trainer listing

3.3.2. Update trainer

Click on  icon beside the record to edit the details, then you will see the trainer details pop-up.

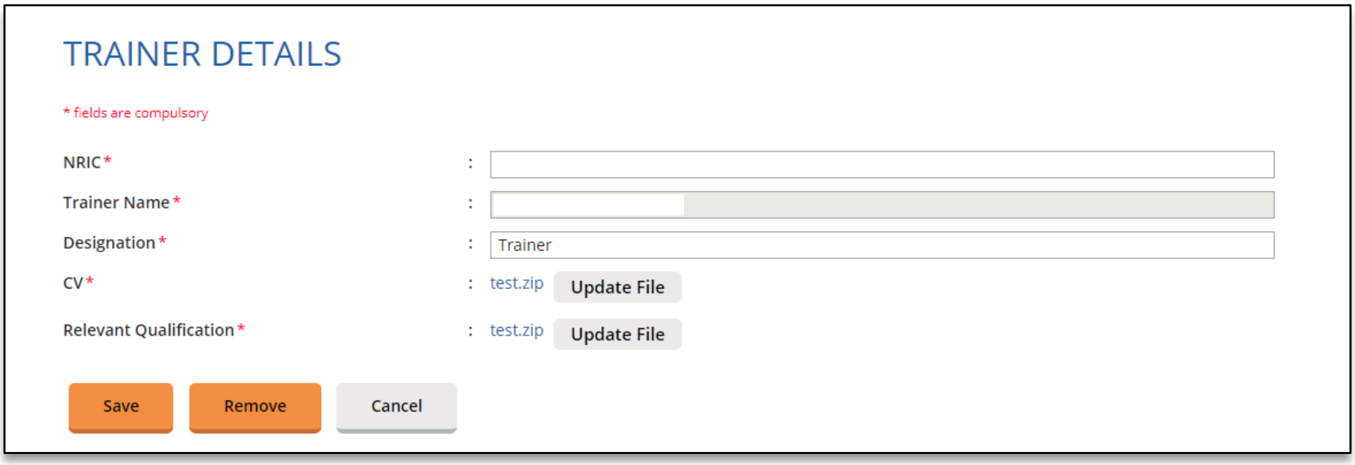


Figure 33: Update Trainer Details

On the Trainer Details pop-up, all fields can be updated, except for Trainer Name. Click **Save** once the fields are updated.

3.3.3. Remove Inactive Trainer

To set a trainer to be inactive (will be hidden from the course management trainer option), click on icon beside the record to edit the details. Click Remove button. The trainer status will be changed to "Removed". To add an inactive trainer back click on icon. Click Add button to make the trainer to be active again.

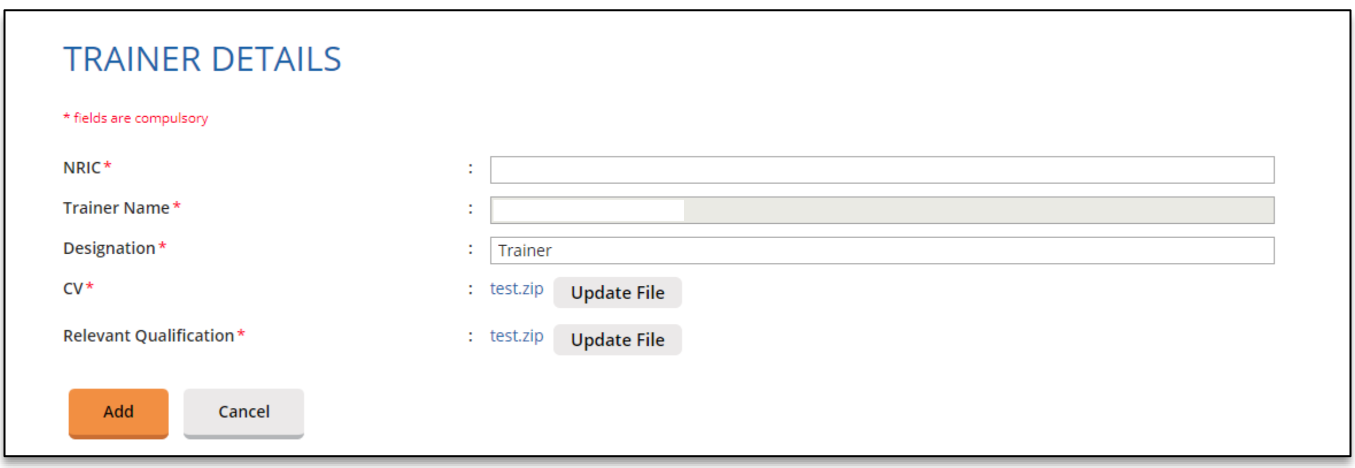


Figure 34: Add Inactive Trainer

3.3.4. **Delete trainer**

To remove the trainer record, click on icon beside the record. Deletion can only be done to trainer that has not been assigned yet to any of sessions. Trainer that have been scheduled to conduct courses cannot be deleted, but can only be set to be inactive as stated in Para 3.3.3. above. The confirmation pop-up will appear as shown below.

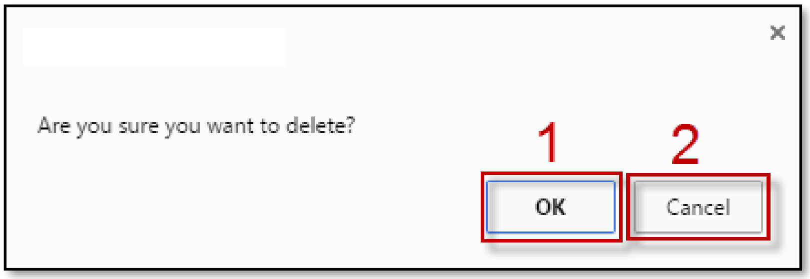


Figure 35: Remove trainer - Confirmation pop-up

Description:

1. **OK**
   Click this button if you want to delete the trainer record from the system.
2. **Cancel**
   Click this button if you do not want to delete the trainer, then the pop-up will be closed.

3.3.5. **Search trainer**

Course Provider is able to search trainer record by using following filters:

- NRIC
- Trainer Name

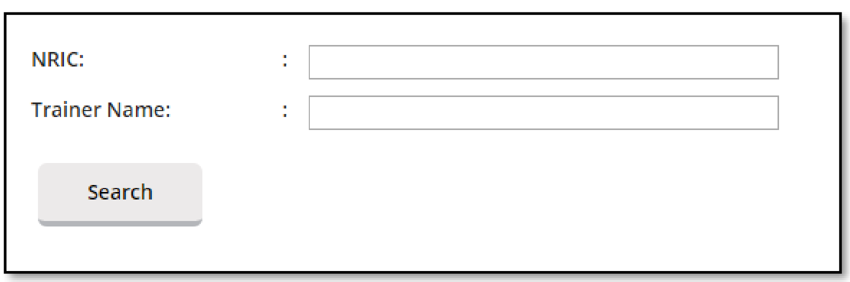


Figure 36: Search trainer

Fill in at least one of the search filter. Then click on **Search** button to get the search result.

3.4. Attendance Management

This chapter shows you how to manage the attendance records in the system. To access the Attendance Management page, click **Course Providers E-Services >> Attendance Management**.

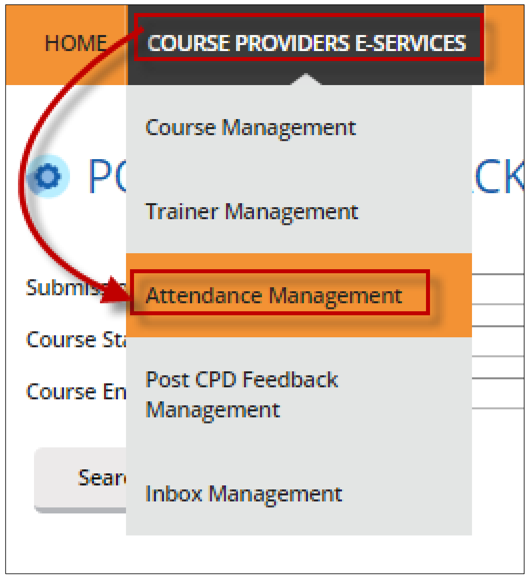


Figure 37: Course Providers E-Services tab drop-down menu: Attendance Management

You will be redirected to Attendance Management page as shown below.

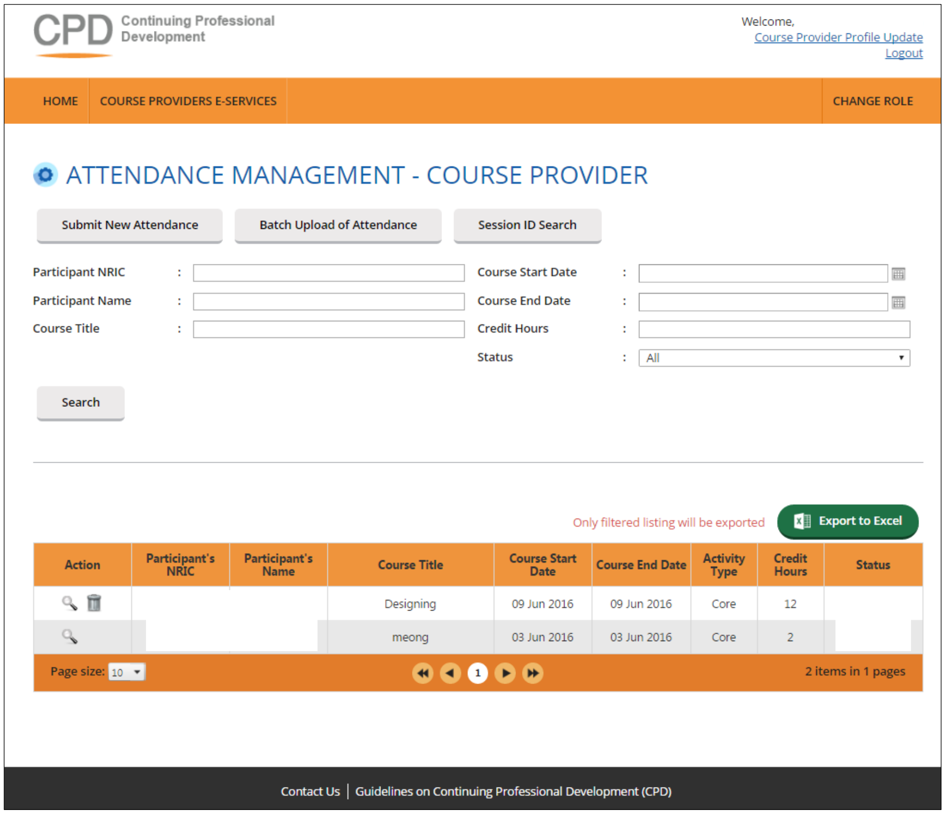


Figure 38: Attendance Management – Course Provider

3.4.1. **Submit New Attendance**

Course Provider is only required to submit attendance record for **core CPD course only**. To submit new attendance record, click on **Submit New Attendance** button and you will see the following pop-up:

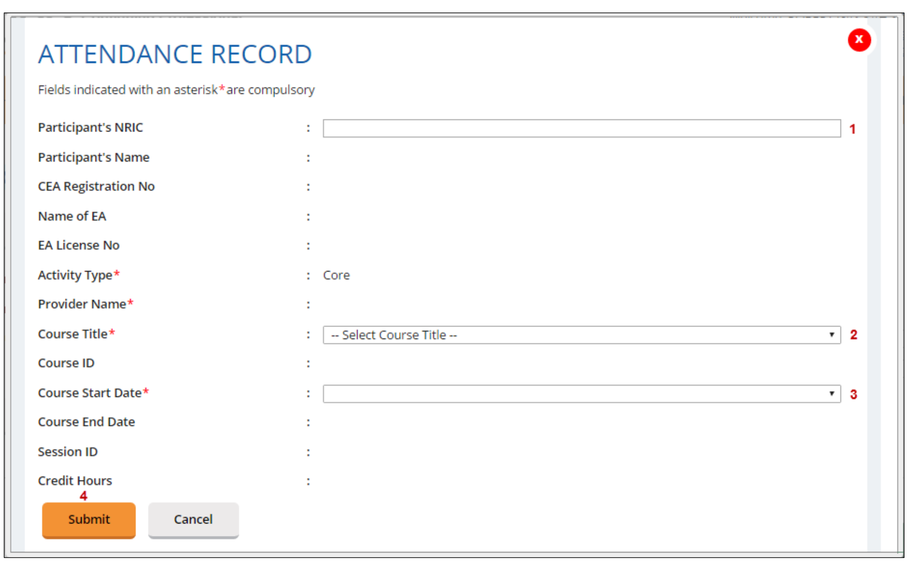


Figure 39: Submit New Attendance Records

Then follow these steps below.

1. First, fill in **Participant's NRIC**. The Partipant's Name, CEA Registration No, Name of EA and License No fields will be auto-populated.
2. Select **Course Title**. The Course ID will be auto-populated.
3. Select **Course Start Date** from the drop-down menu. The Course End Date, Session ID and Credit Hours fields will be auto-populated.
4. Click **Submit** once you are done with the attendance details.

The new attendance record will be displayed in the listing table as shown below.

Action	Participant's NRIC	Participant's Name	Course Title	Course Start Date	Course End Date	Activity Type	Credit Hours	Status
			Designing	09 Jun 2016	09 Jun 2016	Core	12	
Page size: 10			1				1 items in 1 pages	

Figure 40: Attendance Record List

3.4.2. Batch Upload of Attendance

To update multiple records, you can click Batch Upload of Attendance button, and the following pop-up will appear.

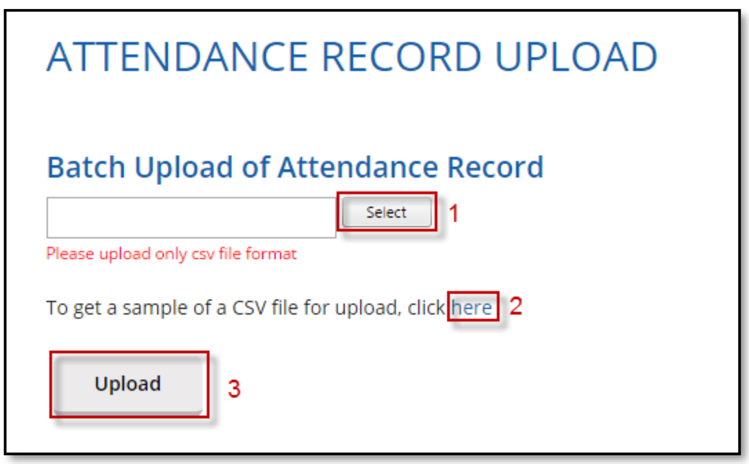


Figure 41: Batch Upload of Attendance

Description:

1. Select the attendance file that you wish to upload. Only file format **CSV is allowed**.
2. Click this link to download sample of CSV file if you do not have a CSV file for uploading. Please take note that it is recommended to use the template provided in the sample file, as different template (different column header) may result in uploading error.
3. Key in the required information in the CSV file. The date format should be **DD-MM-YYYY or DD/MM/YYYY**. Click **"Upload"** to submit the file.

If all the records are successfully uploaded, success notification will appear and the pop-up will automatically be closed.

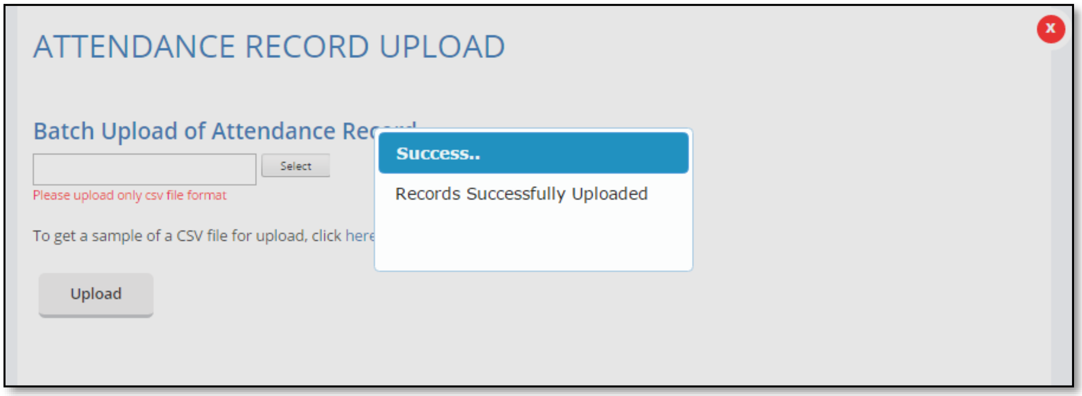


Figure 42: Batch Upload of Attendance Records – Success Notification

If some records fail to be uploaded, an example of the error notification will appear as shown below.

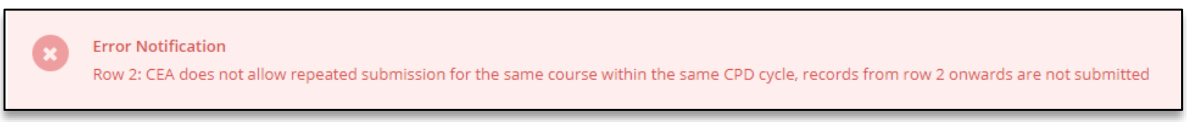


Figure 43: Batch Upload of Attendance Records – Error Notification Example

Please take note that if a row of record in the CSV file fails to be submitted, the rest of the records below it will not be submitted. Please repeat the above steps in Para 3.4.2 to upload the attendance records after correcting the error in the affected row and removing the submitted rows above it.

For further details on the error notifications and how to rectify it, please refer to **Para 4**.

3.4.3. Session ID Search

Course Provider is also able to search the ID of the course session by clicking on Session ID Search tab. The Session ID Search pop-up will appear as shown below.

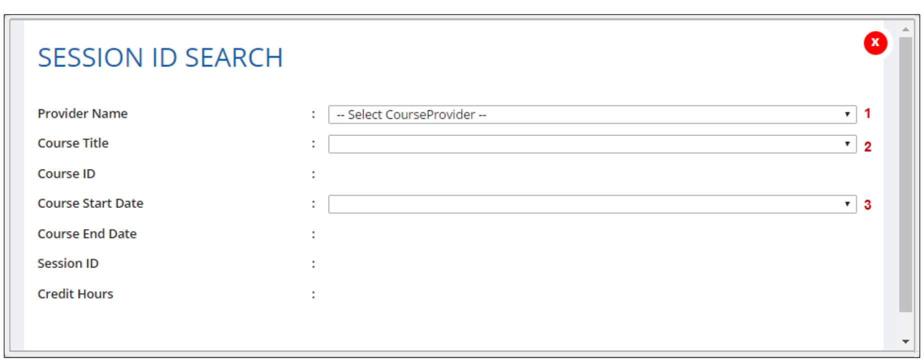


Figure 44: Session ID Search

To search session ID:

1. First, indicate the Course Provider name.
2. Select course title from the drop-down menu based on the selected Course Provider. The Course ID will be auto-populated.
3. Select Course Start Date from the drop-down menu. The Course End date, Session ID and Credit Hours fields will be auto-populated.

3.4.4. **Search Attendance**

Course Provider is able to search attendance record by using the following filters:

- Participant NRIC
- Participant Name
- Course Title
- Course Date
- Credit Hours
- Status

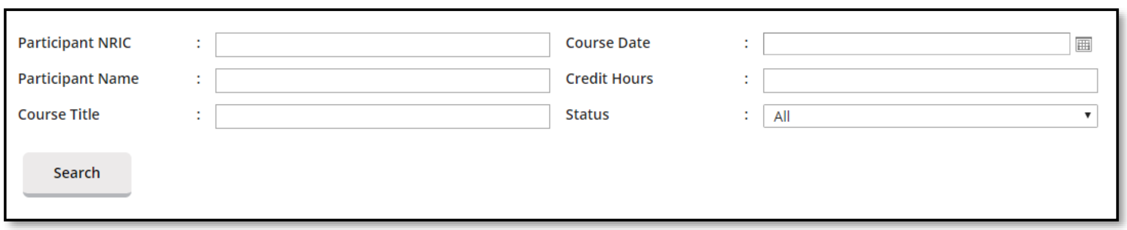


Figure 45: Search attendance

Fill in at least one of the search filters. Then click on **Search** button to get the search result.

3.4.5. **View Attendance**

On this module, Course Provider is able to view the course details that have been submitted by the Course Provider. Click on icon beside the record. The course details will appear as shown below:

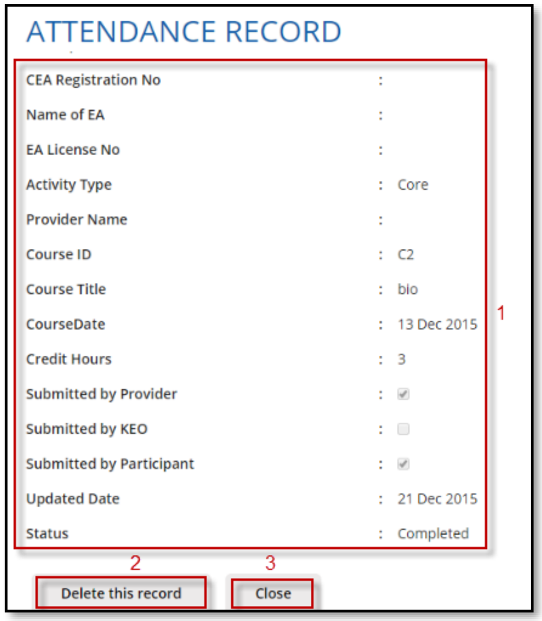


Figure 46: View attendance records

Description:

1. **Attendance record details**
   Contains details of the attendance record that is submitted by the course provider.
2. **Delete this record**
   Deleting this record is allowed only for attendance records with “Pending” status.
3. **Close**
   You will be redirected to the attendance monitoring management listing page.

3.4.6. Export Attendance Records

To export attendance record, click **Export to excel** button that is located above the table listing. The attendance file will be downloaded.

3.4.7. Delete Attendance Records

Only attendance records with “Pending” status can be deleted. To delete, click on icon beside the record. Then the confirmation pop-up will appear as shown below.

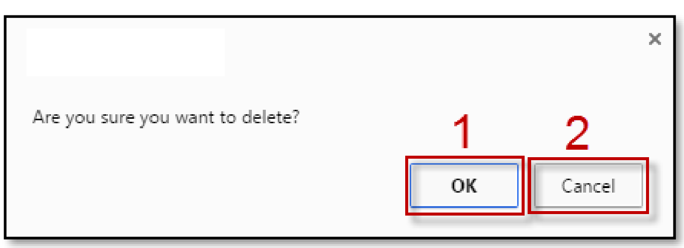


Figure 47: Delete Attendance Record - Confirmation pop-up

Description:

1. **OK**
   Click this button if you want to delete the attendance record from the system.
2. **Cancel**
   Click this button if you do not want to delete the attendance record, then the pop-up will be closed.

3.5. Post CPD Feedback Management

This chapter shows you how to manage feedback record in the system. To access Feedback Management page, click **Course Providers E-Services >> Post CPD Feedback Management**.

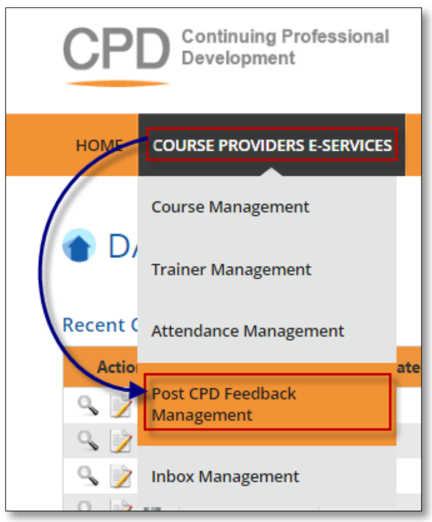


Figure 48: Course Providers E-Services tab drop-down menu: Feedback Management

You will be redirected to Feedback Management page as shown below.

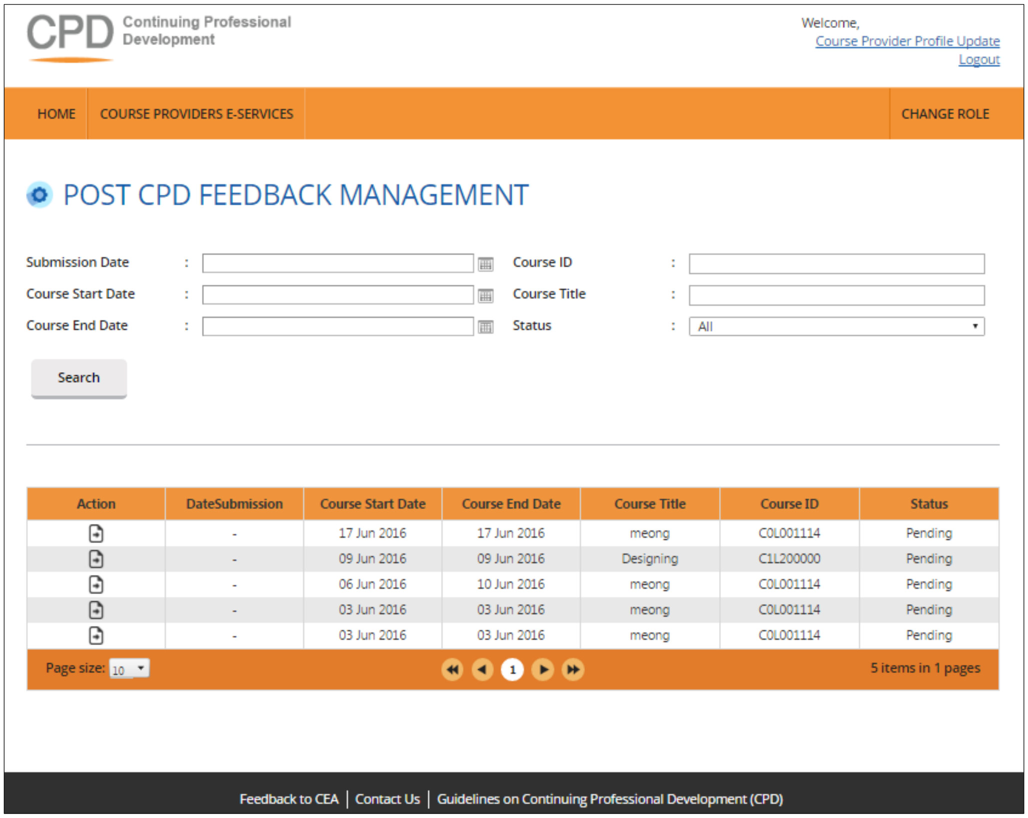


Figure 49: Feedback Management

3.5.1. **Search Feedback**

Course Provider is able to search feedback by using following filters:

- Submission Date
- Course Date
- Course Title
- Course ID
- Status

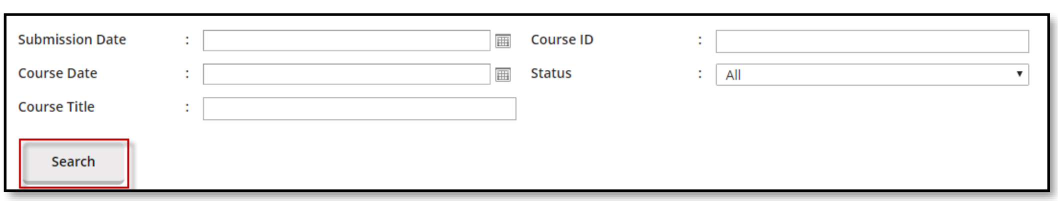


Figure 50: Search Feedback

Fill at least one of the search filters. Then click on **Search** button to get search result.

3.5.2. **Upload Feedback**

Click on icon beside the session record. The following pop-up will appear.

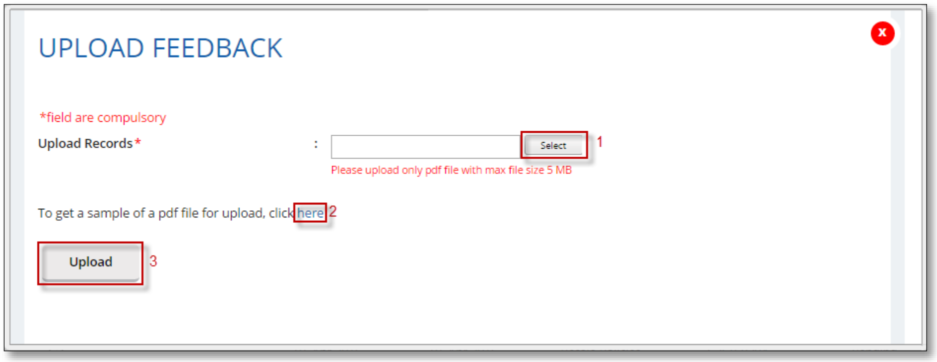


Figure 51: Upload Feedback

Description:

1. Select feedback file that you want to upload. You can only upload file **in PDF format with maximum file size of 5 MB**.
2. Click this link to download sample feedback report.
3. Click **"Upload"** to submit the file.

3.5.3. Download Feedback

To download feedback, click beside the session record. The file will be downloaded.

3.6. Inbox Management

This module is provided for Course Provider to communicate with CPD System Administrator. Expand **Course Providers E-Services** tab, then click on **Inbox Management**.

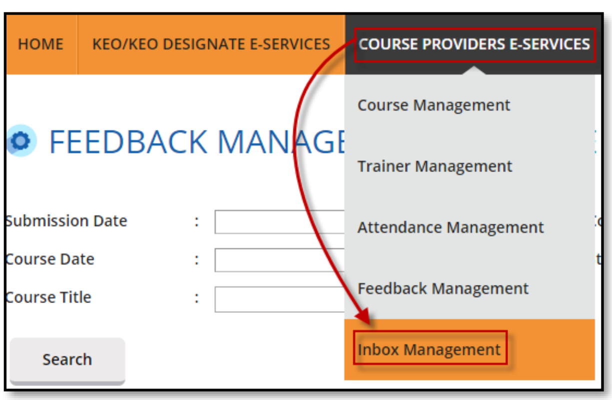


Figure 52: Course Providers E-Services tab drop-down menu: Inbox Management

You will be redirected to Inbox Management page as shown below.

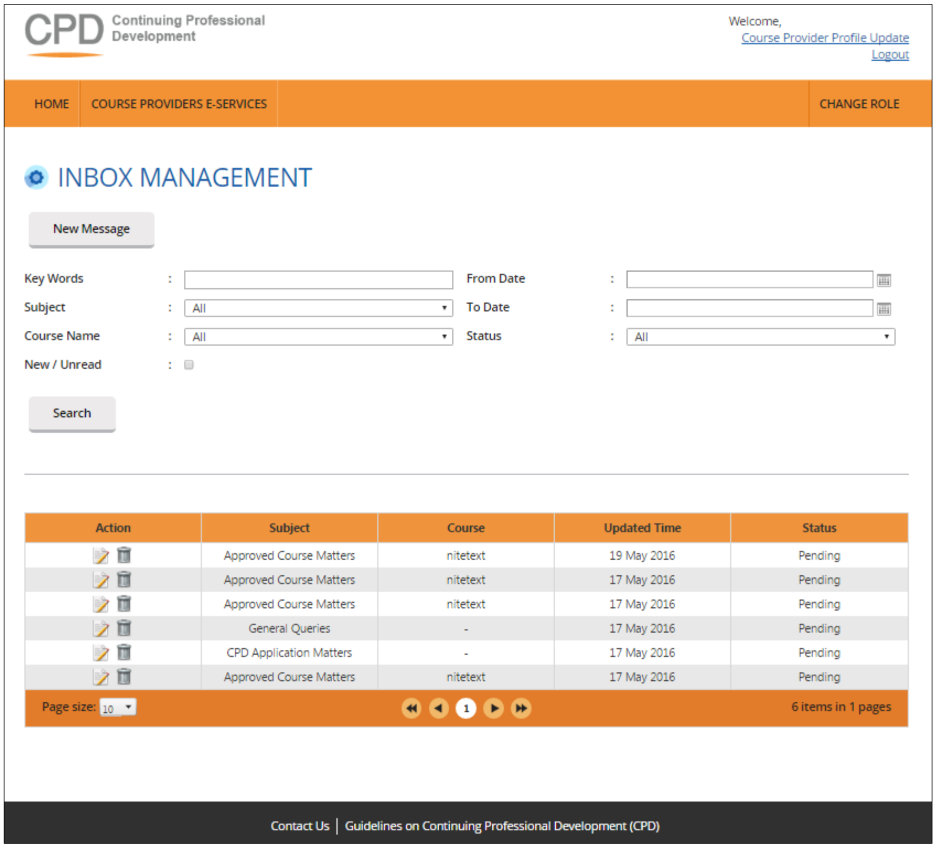


Figure 53: Inbox Management

3.6.1. Compose New Message

To create new message, click on **New Message** button.

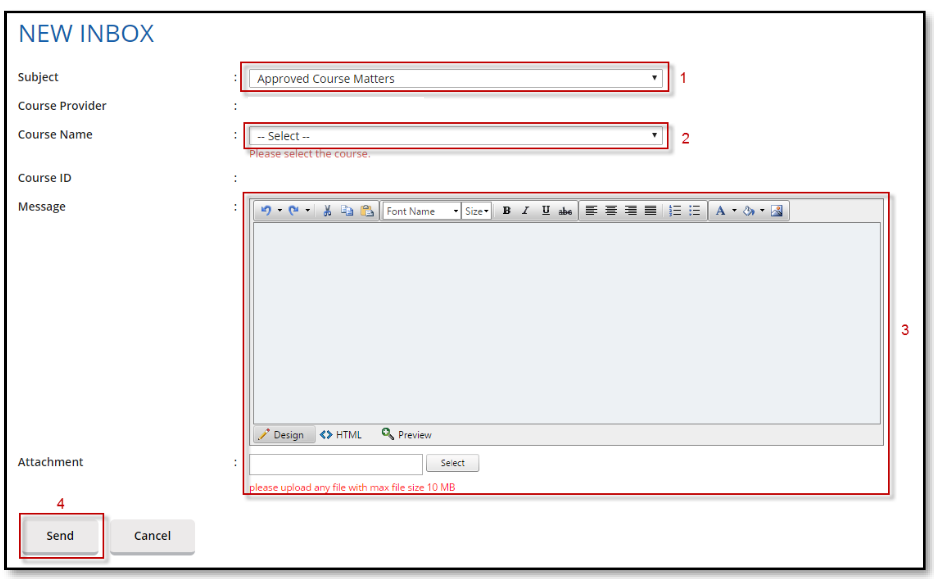


Figure 54: Compose New Message

1. Select **Subject** option. There are 3 (three) options that are provided: Approved Course Matters, CPD Application Matters and General Queries.
2. Select **Course Name** from the drop-down list. The Course ID field will be auto populated based on the selected course.
3. You can write your message content and attach a file if needed (the maximum file size is **10 MB)**.
4. Click **Send** to send the message to CPD System Administrator.

3.6.2. **Search Message**

Course Provider is able to search message record in the Inbox Management module by using the following filters:

- Key words
- Subject
- Course Name
- New/Unread checklist
- From Date
- To Date
- Status

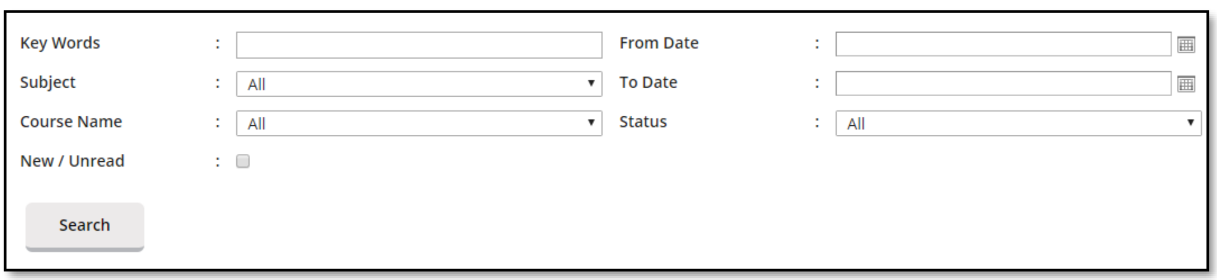


Figure 55: Search message

Fill in at least one search filter. Then click on **Search** button to get search result.

3.6.3. **Reply Message**

Course Provider is able to reply messages sent by CPD System Administrator. To do this, click on icon beside the record. Bold messages means new or unread messages. Message thread will pop out as shown below.

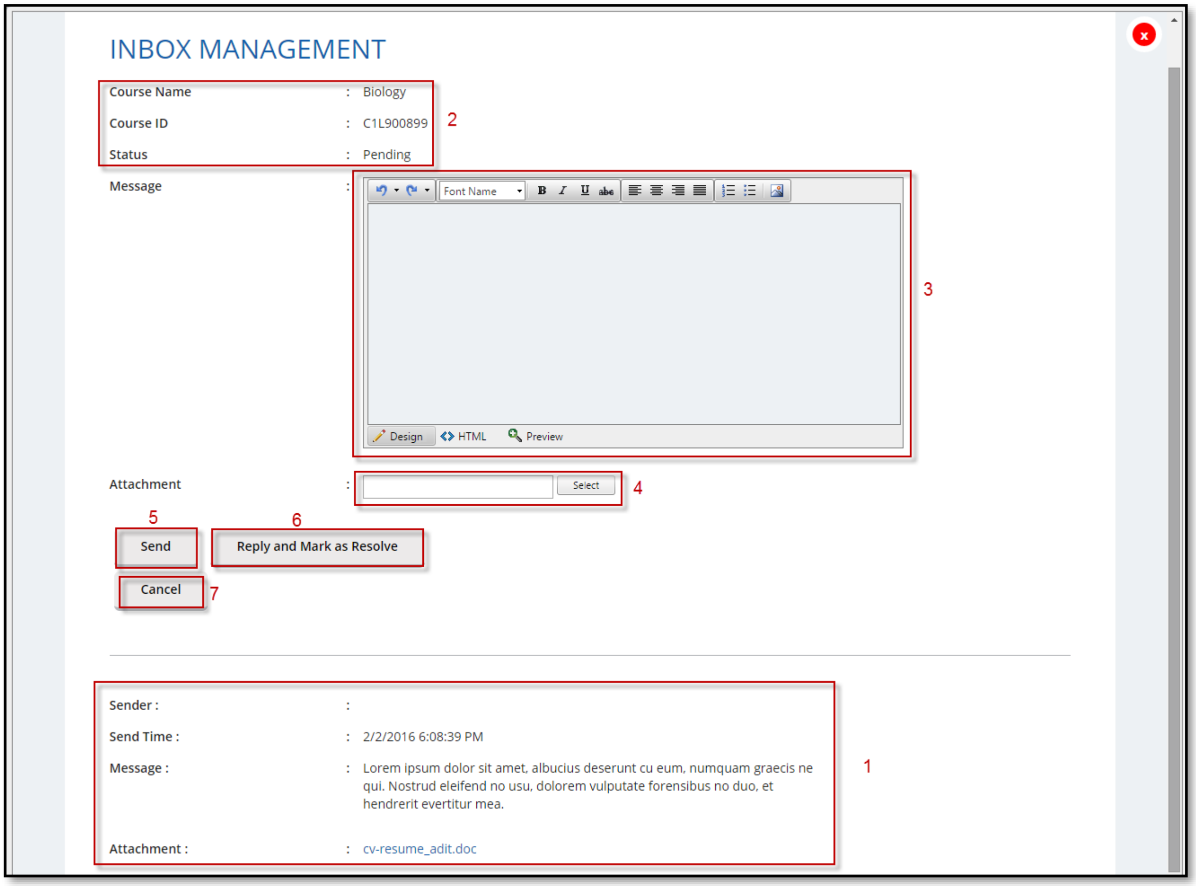


Figure 56: Message thread

Description:

1. **Message content**
   Displays message details - course provider name, send time, message content and attachment that is submitted by course provider.
2. **Course details**
   Displays course details - course name, course ID, and message status.
3. **Message field**
   Course Provider is able to reply the messages by writing in the message context box.
4. **Attachment**
   Course Provider is only able to attach 1 (one) file per reply by clicking on the Select button. Maximum size that is allowed to be uploaded is **10 MB.**
5. **Send**
   Press Send button to send the reply.
6. **Reply and Mark as Resolve**
   Press Reply and Mark as Resolve to send the reply and indicate that matter has been resolved.
7. **Cancel**
   You will be redirected to the previous page and the draft message will be discarded.

Once you reply to the message, your reply details will be displayed in the same thread.

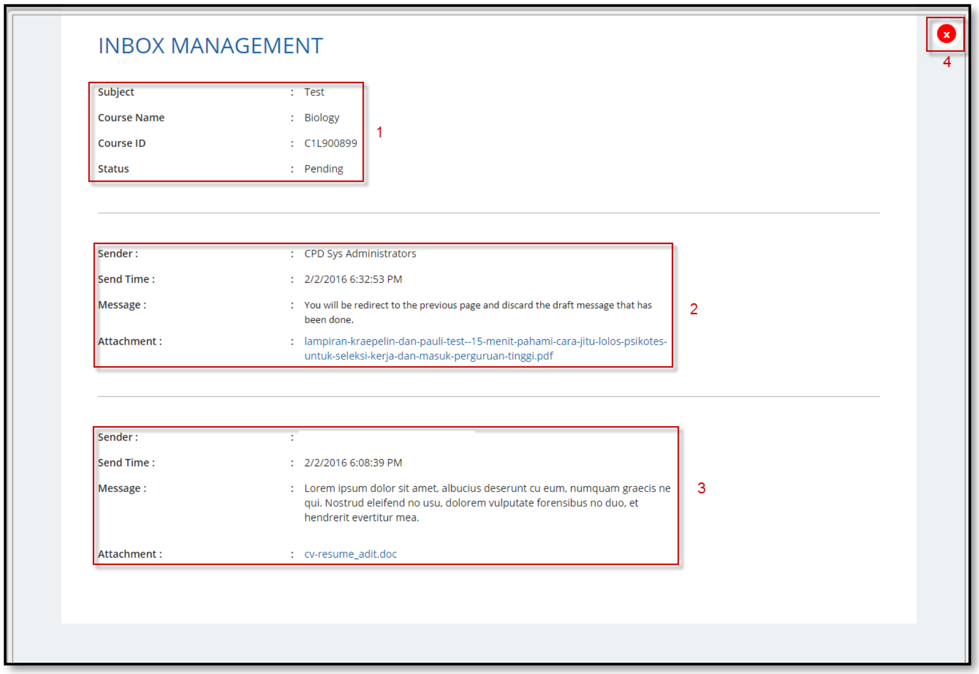


Figure 57: Message thread conversation

Description:

1. Message details that are submitted by course provider.
2. Content of the reply from the CPD System Administrator.
3. Message content that is submitted by course provider.

3.6.4. Delete Message

Click on the icon beside the record at the message listing. Confirmation pop-up will appear as shown below.

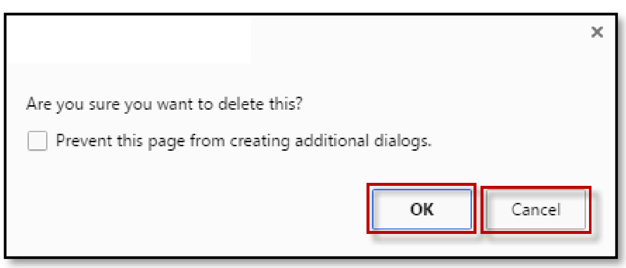


Figure 58: Confirmation pop-up

Click **"OK"** on the confirmation pop-up if you wish to proceed to delete the message or **"Cancel"** if you do not wish to delete the message.

4. ERROR NOTIFICATION HANDLING IN BATCH UPLOAD

For the type of errors that may encountered while using batch upload for attendance submission and how to rectify it, please refer to the table below:

#1	Error Notification No file or Invalid file format
Possible Causes	(1) No file selected (2) Select file other than CSV file
How to Rectify	(1) Select a CSV file to use (2) Select only CSV file and download the sample CSV file

#2	Error Notification Incorrect file format is used, please follow the provided format
Possible Causes	Using wrong CSV format that is not suppose to be used by CP. i.e KEO attendance submission form
How to Rectify	Using the CSV format provided in the sample CSV file

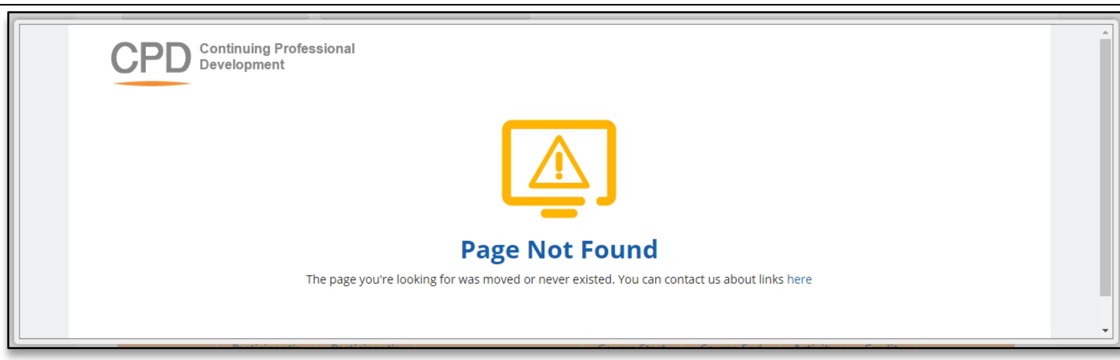
#3	Error Notification Row 2: No salesperson found or wrong salesperson, records from row 2 onwards are not submitted
Possible Causes	(1) Incorrect NRIC format used (2) There is no Salesperson with one (or more) of the NRIC listed in the CSV file found in the system / Inputting wrong NRIC of the salesperson (3) Salesperson's name or registration number or name of estate agent or license no of the estate agent not filled in the CSV file (4) Blank row(s) exist(s) between the row filled with to-be-submitted data in the CSV file
How to Rectify	(1) Using correct NRIC format: #0000000@ (# = S, T, F, G and @ = checksum letter) (2) Make sure the NRIC of the salesperson is already correct and registered to the CPD portal (3) Make sure the required data related to the salesperson identity and organization completed in the CSV file (4) Delete the blank row in the CSV file

#4	Error Notification Row 2: CEA does not allow repeated submission for the same course within the same CPD cycle, records from row 2 onwards are not submitted

Possible Causes	(1) Submitting record that is already existed in the system (2) There are duplicated records inside the CSV file
How to Rectify	(1) Delete the record from the CSV file as the system will inform which line/row in the CSV file that the system cannot processed. If the submitted record is incorrect, please contact CEA for assistance (2) Make sure there is no duplicates of records in the CSV file

#5	
Possible Causes	Session ID that is not yet started inserted in the session ID column and try to be uploaded
How to Rectify	Use the session ID that already ended

#6	
Possible Causes	Course ID wrong or blank, Session ID wrong or blank
How to Rectify	Fill with the correct course ID and/or session ID

#7	
Possible Causes	(1) Using CSV file without column header (first row) that is provided in the CSV sample file (2) Submit CSV file but not with CP format
How to Rectify	(1) Use the sample CSV file as there the column header is already provided (2) Using the correct format for CP