



CANDIDATE USER JOURNEY

11/11/09

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Brief ▶

The following document describes the functionality found in the online Professional Development System.

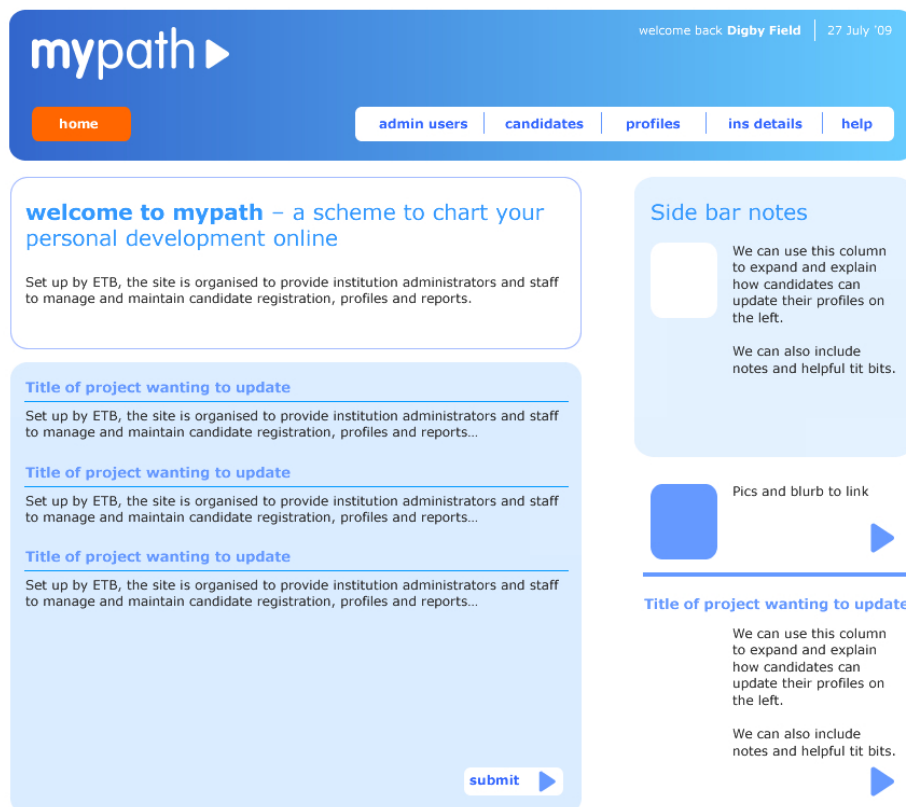
This document is designed to illustrate how the system will be navigated by candidates using it for planning, recording and reporting of evidence – either towards registration with an Institution or for maintaining their ongoing professional development.

A separate Institution User Journey accompanies this document.

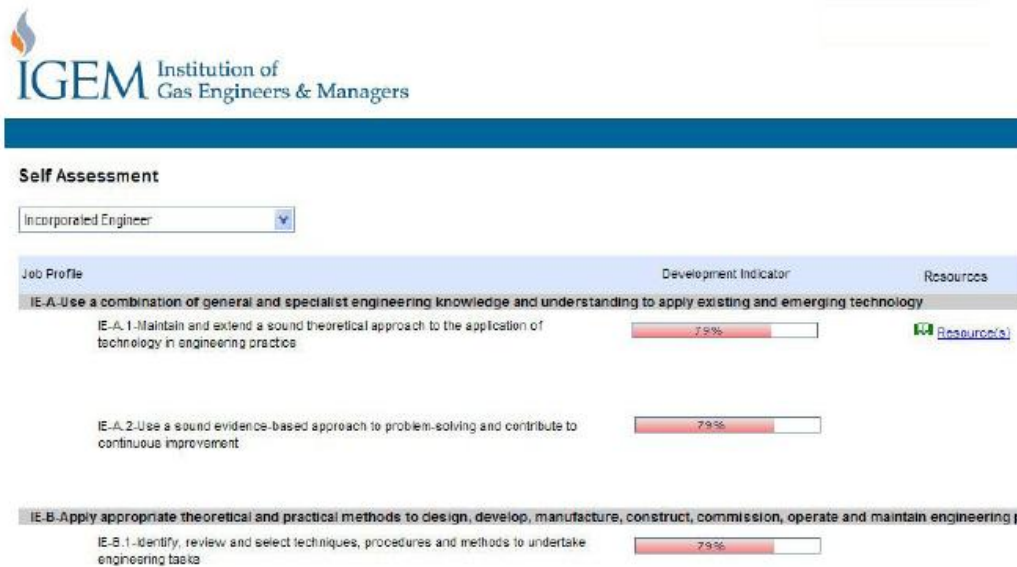
Look & Feel ▶

The project will have 2 distinct user interfaces, one for candidates and one for administration. Each user interface will give access to appropriate functionality. Access to the PDS will be controlled by user login and role based access rights.

There will be a generic interface for institutions:



The candidate user interface will also include skinning capability so that the PDS can match the Institution web site styling if preferred.



A navigation system will be devised that comprises of primary and secondary menus. The primary menu will be visible at all times to provide easy access to the various sections of the application.

The secondary menu will be specific to the section selected by the user.

The menus will be highlighted to confirm the location of the selected page.

1. Login and Registration ▶

On registering with the system the candidate is asked to specify their username and password (note this only applies if the system is not set up with a single sign on process to existing member databases)

mypath ▶

[home](#)

candidate registration form

Please enter your registration details below:

Username *

First Name *

Surname *

Company

ECUK Reg No

Email *

Confirm Email *

Password *

Confirm Password *

[add an institution](#)

Institution ▼

Membership No

[Add](#) ▶

Institution	Membership No	
CIBSE	32424324234	Remove
EI	32424324777	Remove

[terms & conditions](#)

I have read and accept the terms and conditions. ▼ *

[Register](#) ▶

notes

Some notes on how to complete the registration form...

mypath ▶

[home](#)

1: login - I am an existing candidate and already have a mypath account

Use this option if you are already registered on this website and you wish to access your account.

user name

password

[Login](#) ▶

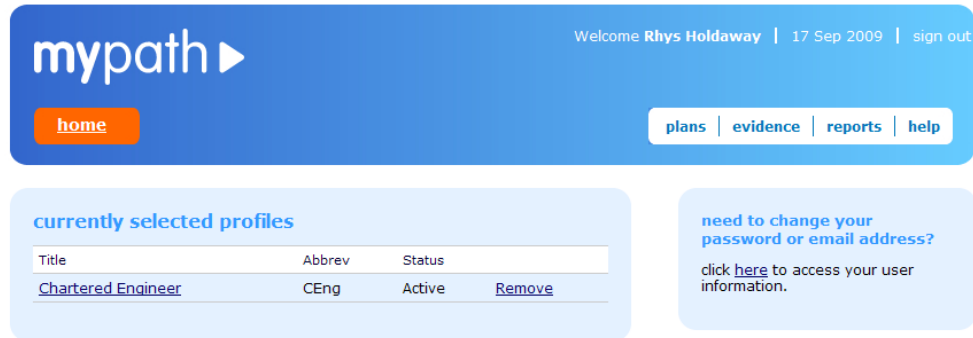
2: register - I am a new candidate and I wish to create a new mypath account

Use this option if you have not used this website before and haven't set up a candidate account.

[register](#) ▶

2. My Homepage ▶

“My Homepage” allows you to manage the job profiles associated with your PDS user ID. By adding a profile to the “Current Profiles” field, you are ensuring your access to the appropriate job profile(s) for you to benchmark your skills against.



The screenshot shows the mypath user interface. At the top, there is a blue header with the mypath logo on the left, a welcome message "Welcome Rhys Holdaway" and the date "17 Sep 2009" in the center, and a "sign out" link on the right. Below the header, there is a navigation bar with a "home" button on the left and "plans | evidence | reports | help" links on the right. The main content area is divided into two sections. The left section is titled "currently selected profiles" and contains a table with the following data:

Title	Abbrev	Status	
Chartered Engineer	CEng	Active	Remove

The right section is titled "need to change your password or email address?" and contains a link: "click [here](#) to access your user information."

To add an available profile to your current profile:

1. Click a profile from the list of “Profiles”.
2. Click the “ADD” button to move the selected profile(s) into the “My Profiles” field. Repeat as necessary until all desired profiles have been moved into the “My Profiles” field.

To remove a profile from your current profile:

Press “remove”

To edit user details click “here” in the box on the left.

3. Self Assessment ▶

Select you're a profile from the dropdown menu, move the skill level sliders for each standard according to your level of competence.

The screenshot shows the mypath self-assessment interface for a Chartered Engineer profile. The header includes the mypath logo, a welcome message for Peter Naylor, the date 11 Aug 2009, and a sign out link. Navigation buttons for home, profiles, evidence, plans, and help are visible. The main content area is titled 'profile: Chartered Engineer' and contains a table of competency standards with sliders for each. Below the table is a 'request review' section with a checkbox and a reviewer email field. At the bottom is a 'review comments' section with a timestamp and a comment.

code	competency description	% Done
A	Use engineering knowledge and understanding to apply technical and practical skills. This includes the ability to:	
A1	review and select appropriate techniques, procedures and methods to undertake tasks	25
A2	use appropriate scientific, technical or engineering principles.	50
B	Contribute to the design, development, manufacture, construction, commissioning, operation or maintenance of products, equipment, processes, systems or services. In this context, this includes the ability to:	
B1	identify problems and apply diagnostic methods to identify causes and achieve satisfactory solutions	75
B2	identify, organise and use resources effectively to complete tasks, with consideration for cost, quality, safety and environmental impact.	25
C	Accept and exercise personal responsibility. This may include the ability to:	
C1	work reliably and effectively without close supervision, to the appropriate codes of practice	50
C2	accept responsibility for work of self and others	25

request review

Submit this for review.

Reviewer Email

Save Changes ▶

review comments

peter@fieldd.gotadsl.co.uk : 07/08/2009 00:00:00

This is a great assessment

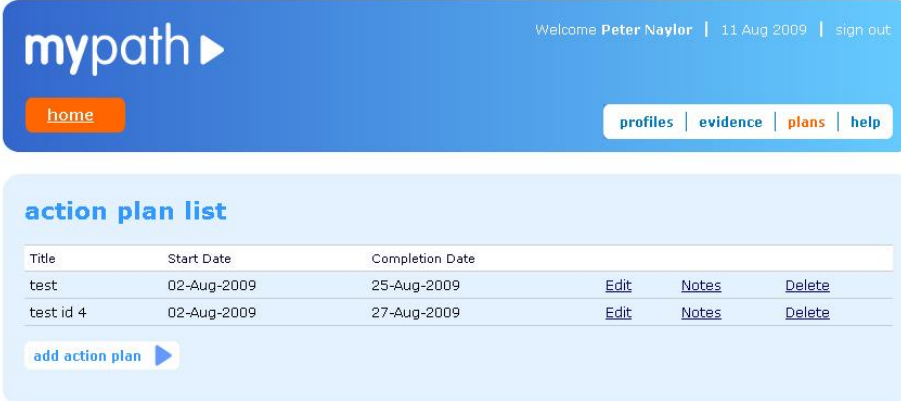
1. When finished, click the “Save Changes” button to finalise your selection.
2. An option is available to allow you to submit this assessment for review (they will gain one time access to your system to amend this profile)

4. Plans ▶

The following section describes how to create a plan.

Columns visible in “Plan Overview(s)” page

Plan Title / Start Date / Completion Date / Edit / Notes / Delete



Title	Start Date	Completion Date	Edit	Notes	Delete
test	02-Aug-2009	25-Aug-2009	Edit	Notes	Delete
test id 4	02-Aug-2009	27-Aug-2009	Edit	Notes	Delete

[add action plan](#) ▶

To create a plan:

1. Click the “Plans” tab. The “Plan Overview(s)” page appears.
2. Click “Add Action Plan”. The “Action Plan Wizard” page appears.
3. Complete the following fields:
 - Plan Title: enter a meaningful name for your plan
 - Start Date: enter the current date
 - Completion Date: enter a date 90 days from the start date
 - Objectives: enter your personal objectives for this quarterly plan
4. Complete the following fields (optional):

Click the “Add” button. The competences appear in the selected list box.

5. Click a competency from the. You may select more than one at a time, hold shift +click to select a group of profiles, or hold control +click to select a variety of profiles.
6. Click the “add” button to move the selected competencies into the “Selected Competencies” field.
7. An option will appear to allow you to submit this plan for a send for review (the reviewer will gain one time access to your system to amend this profile)

mypath | Welcome Peter Naylor | 11 Aug 2009 | sign out

[home](#) | [profiles](#) | [evidence](#) | [plans](#) | [help](#)

action plan wizard - enter plan

Enter the details of your plan below:

Name: Peter Naylor

Plan Title:

Objectives:

Start Date:

Completion Date:

competencies

You have not selected any competencies.

[add competency](#)

request review

Submit this for review.

Reviewer Email:

[submit](#) [cancel](#)

[review comments](#)

4b. Editing and Deleting a Plan

Editing a Plan

In certain situations you may want to make revisions to a recently submitted plan or you may find that a plan was returned by your mentor or institution for revision.

The following section describes how to edit a plan.

To edit a plan:

1. Click the Plans tab. The “Plan Overview(s)” page appears.
2. Click the “Edit” button next to the appropriate plan. The “Action Plan Wizard” page appears.
3. Edit the necessary fields.

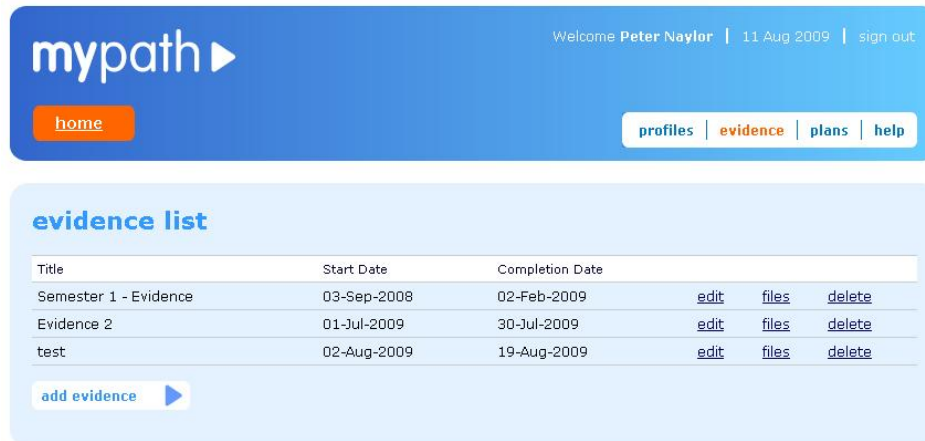
Press Delete to remove a Plan

5. Submitting Evidence ▶

The following section describes how to submit evidence towards a plan and ultimately toward registration.

Columns visible in “Plan Overview(s)” page

Evidence Title / Start Date / Completion Date / Edit / Notes / Delete



mypath ▶ Welcome Peter Naylor | 11 Aug 2009 | sign out

home profiles | evidence | plans | help

evidence list

Title	Start Date	Completion Date			
Semester 1 - Evidence	03-Sep-2008	02-Feb-2009	edit	files	delete
Evidence 2	01-Jul-2009	30-Jul-2009	edit	files	delete
test	02-Aug-2009	19-Aug-2009	edit	files	delete

[add evidence](#) ▶

To upload evidence:

1. Click the “Evidence” tab. The “Evidence Overview(s)” page appears.
2. Click “Add Evidence”. The “Action Plan Wizard” page appears.
3. Complete the following fields:
 - Evidence Title: enter a meaningful name for your plan
 - Start Date: enter the current date
 - Completion Date: enter a date 90 days from the start date
 - Lessons Learnt
 - Benefits Gained

There is the option to add competencies:

Click the “Add” button. The competences appear in the selected list box.

4. Click a competency from the. You may select more than one at a time, hold shift +click to select a group of profiles, or hold control +click to select a variety of profiles.
5. Click the “add” button to move the selected competencies into the “Selected Competencies” field.
6. An option will appear to allow you to submit this evidence to review (they will gain one time access to your system to amend this profile)

mypath Welcome **Peter Naylor** | 11 Aug 2009 | [sign out](#)

home

[profiles](#) | [evidence](#) | [plans](#) | [help](#)

evidence wizard - enter details

Name Peter Naylor

Evidence Title

Lessons Learnt

Benefits Gained

Start Date

Completion Date

competencies

You have not selected any competencies!
Click add or change competencies associated with this piece of evidence.

Choose your profile:

Chartered Engineer

Selected Competencies

[Remove](#)

Available Competencies

A1 - review and select appropriate techniques, procedures and methods to undertake tasks
 A2 - use appropriate scientific, technical or engineering principles.
 B1 - identify problems and apply diagnostic methods to identify causes and achieve satisfactory solutions
 B2 - identify, organise and use resources effectively to complete tasks, with consideration for cost, quality, safety and environmental

[Add](#)

request review

Submit this for review.

Reviewer Email

save
cancel

review comments

You will then be asked if you want to upload evidence / associated files.

mypath Welcome | 11 Aug 2009 | [sign out](#)

home

[profiles](#) | [evidence](#) | [plans](#) | [help](#)

Evidence Wizard - Upload Evidence

Uploaded evidence files:

Title	File Name
A file	Columns.doc View Delete

Title

Select File Browse...

[Return to evidence list.](#)

6. Reports ▶

There are two ways to view the evidence you have submitted - by competence, by complete listing.

The following section describes the content on each summary report (click a link below).

- By Competence
- By Evidence

The screenshot shows the mypath website interface. At the top, there is a blue header with the mypath logo and a navigation menu with links for 'home', 'plans', 'evidence', 'reports', and 'help'. The user is logged in as 'Rhys Holdaway' on '17 Sep 2009'. Below the header, the page title is 'current progress reports'. A table lists four reports with columns for title, start date, end date, and type. Each row has 'view' and 'delete' links. A 'new report' button is at the bottom left.

title	start date	end date	type		
fdggfdgfd	01-Jun-2009	09-Sep-2009	competency	view	delete
efre	01-Jun-2009	09-Sep-2009	evidence	view	delete
dsferd	07-Apr-2009	15-Sep-2009	competency	view	delete
gerdfg	01-Jun-2009	16-Sep-2009	evidence	view	delete

6a. Reports by Competency ▶

Will list all reports and outstanding plans created during the time period requested.

To amend the plans and reports edit the original files and rerun the report.

The screenshot shows the 'report wizard - competency based report' page on the mypath website. It features a table with two rows of competency descriptions. The second row is expanded to show a table with columns for 'Evidence', 'Date', and 'Benefits Gained'.

A - Use a combination of general and specialist engineering knowledge and understanding to optimise the application of existing and emerging technology		
A1 - Maintain and extend a sound theoretical approach in enabling the introduction and exploitation of new and advancing technology and other relevant		
Evidence	Date	Benefits Gained
fdsgfadfredrwerwefedfdf rew rwer r	01/07/2009	fredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer r

6b. Report by evidence ▶

Will list all reports and outstanding plans created during the time period requested.

To amend the plans and reports edit the original files and rerun the report.

The screenshot shows the mypath website interface. At the top, there is a blue header with the mypath logo and a navigation menu with links for 'home', 'plans', 'evidence', 'reports', and 'help'. The user is logged in as 'Rhys Holdaway' on '17 Sep 2009'. The main content area is titled 'report wizard - evidence based report' and is divided into three sections: 'section a: plans generated', 'section b: evidence generated', and 'review comments'. Each section contains a table with data.

section a: plans generated

title	start date	end date	Objectives
rew	01/07/2009	12/08/2009	fredrwerwefedfdf rew rwer fredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer r

section b: evidence generated

title	start date	end date	Benefits Gained
fdsgfadfredrwerwefedfdf rew rwer r	01/07/2009	09/09/2009	fredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer rfredrwerwefedfdf rew rwer r

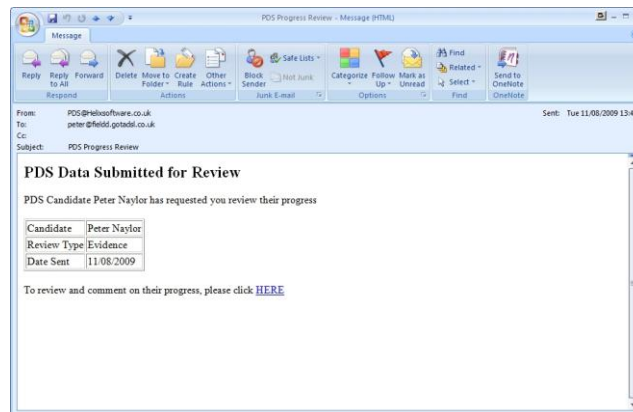
review comments

chris.parker@iheem.org.uk : 14/09/2009 00:00:00
Comments made and noted

7 Reviewing ▶

To add a note to a plan, evidence and report:

1. The option to submit for review is available for status, plans and reports.
2. At the bottom of each section there is a box for entering the email address for the reviewer.



This email will give them a onetime access to the plan, evidence or report.

The reviewer can then leave comments which will appear next to the plan, evidence or report

The screenshot shows the 'mypath' web interface for reviewing candidate progress. The header features the 'mypath' logo and a 'home' button. The main section is titled 'Review Candidate Progress' and contains the following fields:

- Name:** Peter Naylor
- Evidence Title:** Test
- Start Date:** 02/08/2009
- Completion Date:** 19/08/2009
- Lessons Learnt:** test
- Benefits Gained:** test

Below these fields, it states: 'This evidence is associated with the following competencies:' followed by a text box containing 'C2 - Manage the planning, budgeting and organisation of tasks, people and resources.'

The 'Uploaded evidence files:' section contains a table:

Title	File Name	
test	I am a test document.docx	View
test	ECUK.doc	View

At the bottom, there is a 'Review Comment' text area and a 'Submit Review' button.