







## KNOWLEDGE CENTRE USER GUIDE - INDIVIDUAL



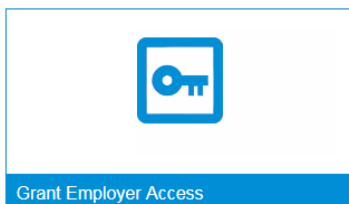
 <p>Find learning <span>▼</span></p>	 <p>MY CPD Log</p>	 <p>Download My CPD</p>
 <p>Complete My Learning <span>▼</span></p>	 <p>Certificates</p>	 <p>Grant Employer Access</p>

An individual user can be a member of CFA UK or a non member who has either registered independently, or has been signed up by their firm to use the Knowledge Centre.

### LOG IN

Go to [www.cfauk.org](http://www.cfauk.org) > Careers & CPD > Knowledge Centre > Start Learning

- If you are a member log in using the same username and password as you would for the CFA UK member area. If you are a non-member use the email address you registered with and the password you set
- If your employer has requested to monitor your CPD activities you will be informed once they are able to do so. You will see your employer's name in the 'Grant Employer Access' area once you log into the knowledge centre



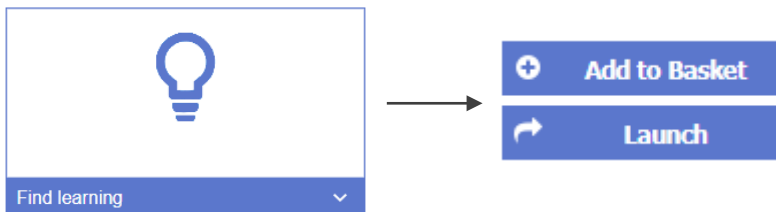
→ You are currently associated with the employer below – this means your employer can assign and monitor your CPD. If you would like to disassociate yourself from this employer, please click on the button below.

1\_CFA Administration

## FIND LEARNING ACTIVITIES

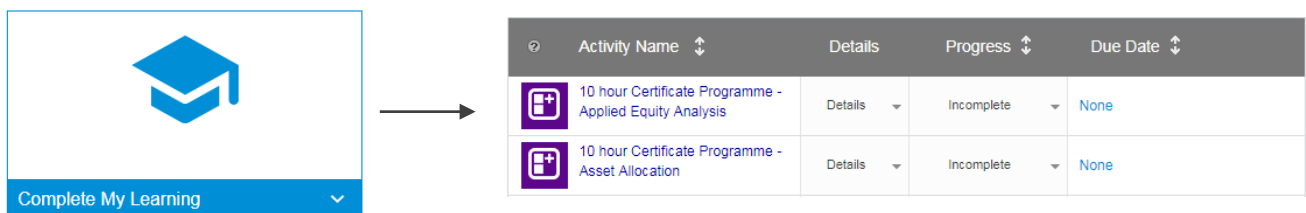
- On the homepage you will see links to different activity types such as webcasts, book assessments and CPD Certificate Programmes which will take you directly to a list of relevant activities – you will notice you can filter these activity lists in a number of different ways on the left hand side. You can also click on 'Browse Activities', 'Browse Topics' and once logged in, 'Find Learning'
- Use the exact word search functionality in the 'Find Learning' section

Once you have selected a learning activity, click the blue 'Launch' button to begin or 'Add to Basket' to collect activities you are interested in before registering for them.



## MONITOR YOUR PROGRESS

- On the homepage you will see a 'Complete My Learning' link, which will take you to a list of your outstanding learning activities. Any activities assigned to you by a super user will appear here



## COMPLETE YOUR LEARNING

**Articles** Click 'Launch' next to your chosen article → Open and read the *Description and Learning Objectives* document → Open and read the article → To log the article as unstructured learning add it to your CPD log manually. To log it as structured learning expand the *Status* column under the article and write a reflective statement on your learning of no less than 150 words, set *Time Spent* to *30mins* and mark the *Status* as *Complete*. The article will then be automatically added to your CPD Log as structured learning.

**Book Assessments** Click 'Launch' next to your chosen book assessment → Open and read the *Description and Learning Objectives* document → Click and pass the book assessment with a maximum of two attempts. Two hours of structured learning will then automatically be added to your CPD Log.

**CPD Certificate Programmes** Click 'Launch' next to your chosen 10 hour CPD Certificate Programme → Click through the five modules in the programme, complete the activities and pass the assessments with a maximum of two attempts. Two hours of structured learning will then automatically be added to your CPD Log for passing each module assessment, totalling 10 hours of CPD. CFA Refresher programmes will award a different number of CPD hours based on readings and assessments completed in each programme.



**Event Slides** Click 'Launch' next to your chosen event slide pack → choose to download or open the slides in your browser → read the slides and add them to your CPD Log as unstructured learning manually.

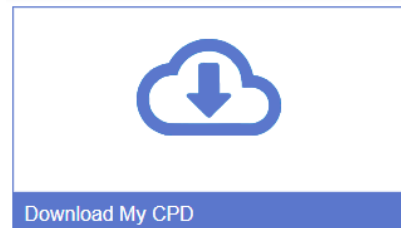
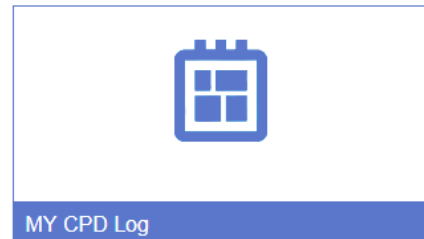
**Podcasts** Click 'Launch' next to your chosen podcast → Listen to the podcast in full. The podcast will then automatically be added to your CPD Log as unstructured learning.

**Webcasts Unstructured:** Click 'Launch' next to your chosen webcast → Open and read the *Description and Learning Objectives* document → Click on and watch the webcast in full. The podcast will then automatically be added to your CPD Log as unstructured learning.

**Structured:** Click 'Launch' next to your chosen webcast → Open and read the *Description and Learning Objectives* document → Click on and watch the webcast in full → Click on and pass the webcast assessment with a maximum of two attempts. The webcast will then automatically be added to your CPD Log as structured learning.

## LOG CPD

- On the home page click on 'My CPD Log' which will take you to a page that displays any planned future CPD you have logged, complete activities which require a learning outcome and eligible (fully complete) CPD
- Use the drop down menu under 'CPD Year' on the left to choose the CPD year you wish to view
- Activities you complete via the CFA UK Knowledge Centre will either be automatically be added to your CPD log or prompt you to add them manually. You can also add non-CFA UK CPD activities by clicking the 'Add CPD' button in your CPD log
- To claim your structured and unstructured CPD hours you will need to add your learning outcomes by clicking on  next to activities that have  in the 'Status' column
- You can download your CPD by clicking on 'Download my CPD Log' on the homepage. On the right side of the following page select an Excel or CSV version of your log from the 'Export' drop down list and click 'Go'
- You can download PDF certificates for every activity you complete by clicking on the 'Download my Certificates' link on the home page.



## FURTHER HELP

For further help, please visit the FAQs section by clicking on the FAQs button at the bottom of the [Knowledge Centre information page](#). Alternatively, please email [cpd@cfauk.org](mailto:cpd@cfauk.org)