



**LEADING TREASURY
PROFESSIONALS**

CPD Log Guide

Welcome to the CPD log. This online system has been provided as an easy way for you to record your CPD. Remember when planning your CPD you need to

IDENTIFY your objectives

ACTION your activities to achieve

REFLECT on the value and skills gained and rate your activity

Our CPD log mirrors this approach to make it a simple process to record your professional development.

1. Getting started

You can find the CPD log at www.treasurers.org/cpd/record

As a member or student, you already have a website account. Your CPD log is directly linked to this account and there is nothing you need to do to create a new account. If you cannot remember your log on details, you can recover your password at www.treasurers.org/user/password.

2. Categorisation

The objectives are organised using the five fundamentals of treasury. General management objectives, such as team management or soft skills development, have been categorised under Treasury Operations and Controls.

3. Your first objective

Start off your CPD log with your first objective. Click the button at the top of the screen:

Add new objective


You will have two options here:

[**Suggest a CPD objective**] will bring up a list of the essential elements of treasury and associated CPD objectives. These are sample objectives but there is no one size that fits all so you can add or replace information as appropriate. If one of the sample objectives fits your requirement, select it and then choose an activity to fulfil that objective.


[**I will write my own CPD objective**] will allow you to define a completely new objective and activity.

You will also be asked to provide an 'Effective from' date. This will probably be the day you add the objective but could be a past date if this is the date you started working on the objective.

4. Adding more activities

Once you have added an objective to your log, you can add more activities to that objective with the  symbol.


5. Adding a pre-populated ACT event you have attended


If you have attended an ACT event, this will be logged within the development activity section. To add this to your record, you need to set up an objective and then use the  symbol to 'Add activity'. A box will appear with three options:

- New activity
- Select from your ACT event attendance activity
- Search for activity on the ACT's website

Select the middle option – Select from your ACT event attendance activity. This will provide a list of ACT events you have attended and you can click on the one you want to add to your activity log.













6. Editing your objective/activity






You can edit your objective at any time by using the  symbol.

You can edit your activity, which includes changing your activity, adding the completion date, adding information on the value and skills gained in the reflection section, by using the  symbol.

[Add new objective](#) [Show all objectives](#) [Export to Excel](#)

List of current CPD year objectives :

CPD year ending	Effective from	Your objectives and related activities	Completed	Reflect on the value and skills	Treasury Elements
28 May 2014 To understand pensions risks.   					
Apr 2015		▶ For MCTs, look through MCT qualification material (study.treasurers.org).	06 May 2014		Risk Management  
Apr 2015		▶ Work through the Pensions Regulator trustee's toolkit e-learning programme at www.thepensionsregulator.gov.uk/guidance/guidance-trustee-knowledge-and-understanding.aspx .	<input type="checkbox"/>		Risk Management  
02 Jun 2014 To review bank group or potential funding markets for geographic locations where we might expand.   					
Apr 2015		▶ Attend a course	<input type="checkbox"/>		Capital Markets and Funding  

 Add activity
 Edit objective
 Edit activity - eg add a completion date or reflect on the value and skills gained.
 Delete objective or activity
 [Access the log help manual here.](#)

7. Complete your objectives and activities for the year

Although you may wish to add more objectives and activities over the year, it is a good idea to try and record your main professional development objectives as early as possible.

There is a tick box in the log to enable you to show when you have completed your objective.

At the end of any CPD year (ie 30 April) all completed objectives will be moved to the previous years' log. If an objective has not been completed it will be rolled to the current year.

8. Review your objectives

Remember it is important to review your objectives and activities to ensure you have achieved your personal aims.

Delete – delete activities from your objective if you did not complete them, or add them to a new objective for the next year

Treasury elements – activities are organised by the essential elements of treasury. Are you focusing in the right areas?

9. CPD year end

All objectives are recorded based on the CPD year. On 30 April every year all completed objectives will be moved in to the previous years' record. This will ensure only active objectives remain in the new CPD year.

You can access all previous objectives by using the button 'Show all objectives'. If you just want to look at the current year only you can do this by using the button 'Show current CPD year objectives'.

10. Export your objectives

Need an Excel spreadsheet of your log? Click the export button to output either your last 12 months of CPD activity, or your entire CPD history.

11. Get ready for the new year

The CPD log operates on a rolling basis from the date an objective was set. Objectives which are a year old will automatically drop off the main view if you have ticked that they have been completed (don't worry – you can still see them if you set the log view to 'show all objectives').

You can add more objectives at any time, but it is a good idea to aim to complete objectives within 12 months of adding them to the log.

12. Any queries?

If you have any queries using the Activity Log please contact cpd@treasurers.org or call Ria Robinson on +44 (0)20 7847 2555.