

## EDGE – Recording compulsory training – CVs, GCPs and Competencies

### Brief Intro

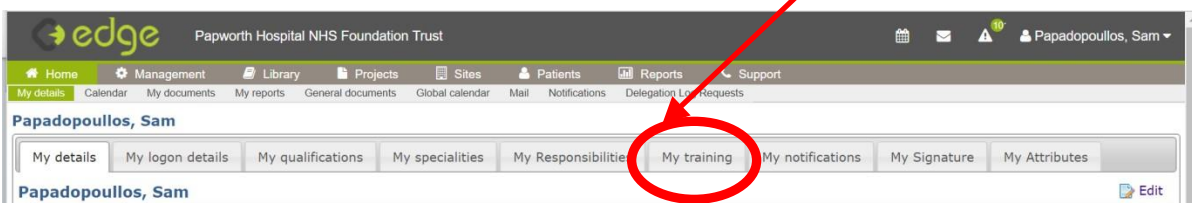
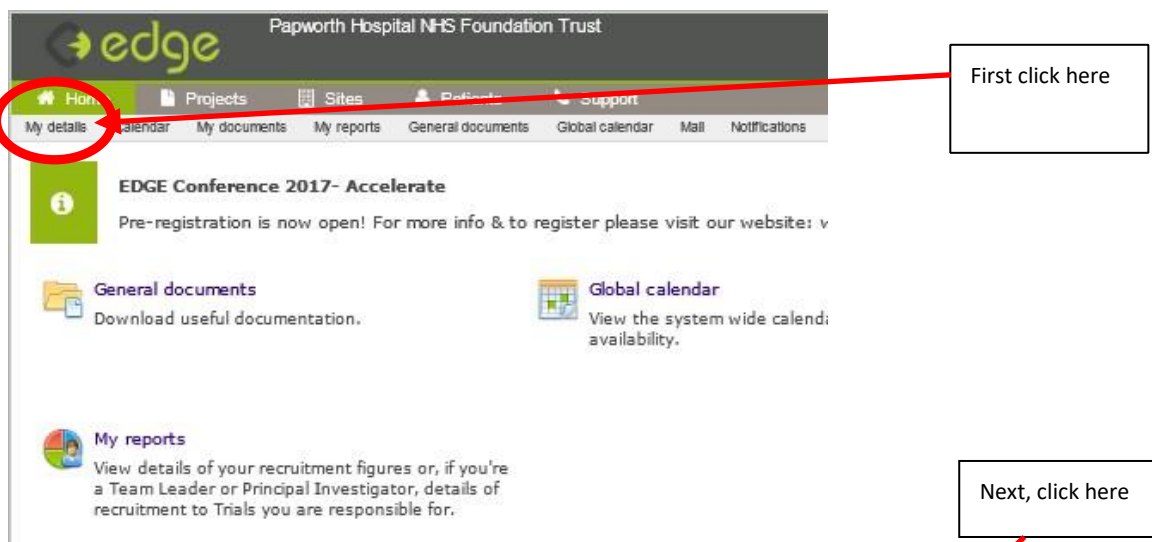
Part one of this guidance will help to explain how to upload you GCP, CV and competency training certificates to EDGE, as well as any other non-compulsory training certificates or documentation that you would like to keep an electronic record of.

Part two explains how to create a folder for your training record and how to upload documents to it.

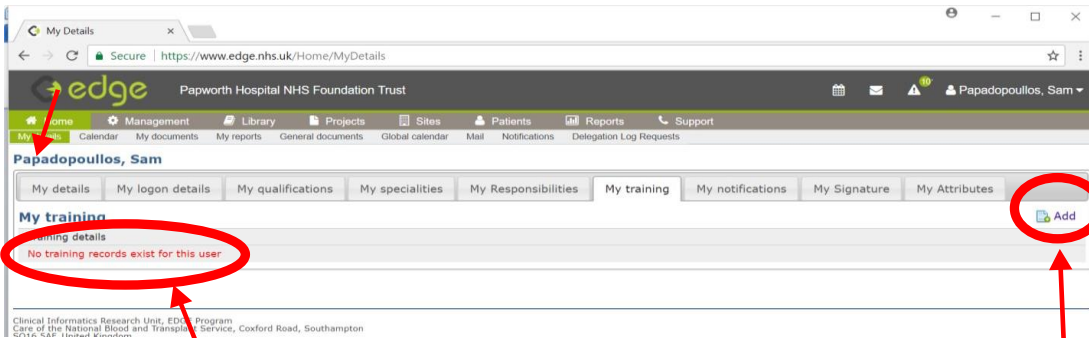
### PART ONE

#### 1. Compulsory training - GCP, CV and competencies

Within the 'My Details' tab you will find a section called 'My Training':

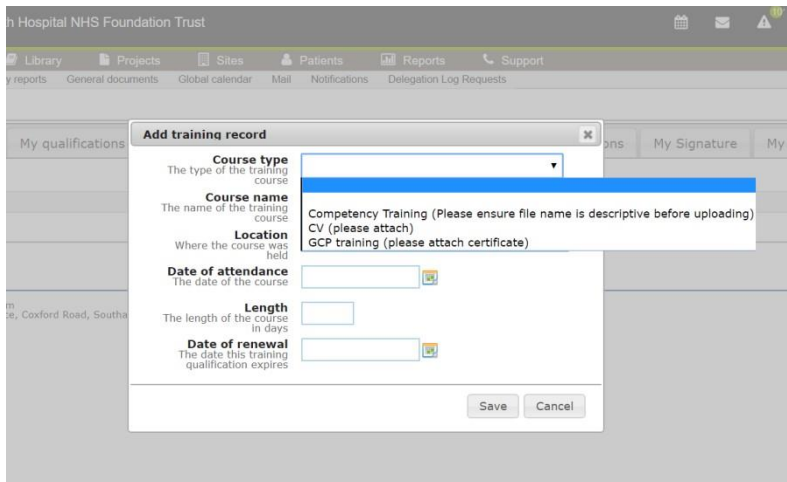


If this is the first time that this section has been accessed it will look like this:



Highlights that no certificates have been added to the system

A training course record needs to be created before certificates can be added to it. Click on the add button in the top right hand corner, it will ask you to select which type of training record you wish to add to the system. First pick a course type (e.g. competency training):



Then choose a course name:

**PLEASE NOTE: The course name list will not list every possible course name; it will simply repeat the name of the course type. When you upload your document, please ensure that the file name clearly describes the name of the course it relates to (how to upload is covered later)**

The screenshot shows a web-based form titled "Add training record". It contains several input fields:
 

- Course type:** A dropdown menu with "Competency Training (Please ensure file r" selected.
- Course name:** A dropdown menu with "Competency Training" selected.
- Location:** A text input field.
- Date of attendance:** A date picker field with a calendar icon.
- Length:** A text input field.
- Date of renewal:** A date picker field with a calendar icon.

 At the bottom of the form are "Save" and "Cancel" buttons. Two red arrows originate from a text box on the right and point to the "Date of attendance" and "Date of renewal" fields.

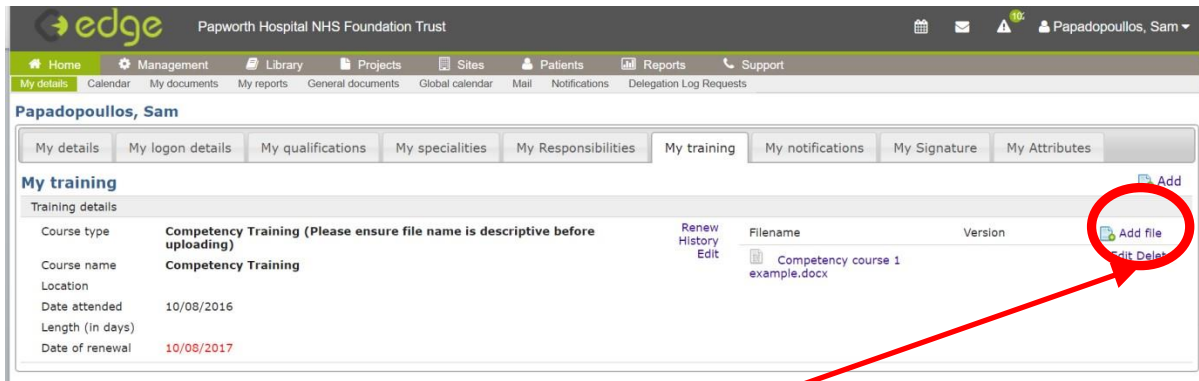
**IMPORTANT: the important part of this is to fill in the date of attendance and date of renewal –this will allow reminders to be sent automatically when they are due to expire**

It is not a requirement to add the location or length of the training, but you are free to do so if you like. Please make sure that you add the dates of attendance and renewal.

**2. Adding compulsory training certificates**

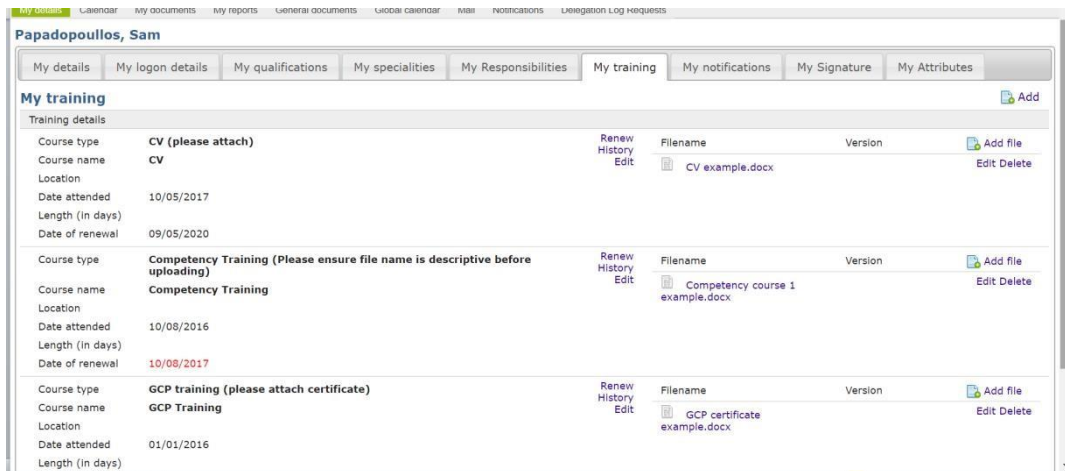
Once the course record has been added, you are then able to add a certificate to the record:

This screenshot is similar to the previous one, showing the "Add training record" form. The "Course name" dropdown menu is open, displaying "Competency Training" as the selected option. The other fields and the "Save" and "Cancel" buttons are also visible.



Click here to add your certificate for that training course.

Once you have added all of your compulsory training courses and their certificates, the page will look like this



### 3. Updating a training record

When you update your training and receive a new certificate, you do not need to create a new training record, you can simply add your new certificate to the existing record.

DO NOT DELETE YOUR PREVIOUS CERTIFICATES – without them you cannot demonstrate continued compliance.

**1. Click add file within the training record that you wish to update**

**My training**

Course type	Course name	Location	Date attended	Length (in days)	Date of renewal	Renew History	Filename	Version	Add file
Competency Training (Please ensure file name is descriptive before uploading)	Competency Training		10/08/2017		10/08/2018	Renew History Edit	Competency course 1 example.docx		Add file Edit Delete
							Competency course 1 update example.docx		Edit Delete
CV (please attach)	CV		10/05/2017		09/05/2020	Renew History Edit	CV example.docx		Add file Edit Delete
GCP training (please attach certificate)	GCP Training		01/01/2016			Renew History Edit	GCP certificate example.docx		Add file Edit Delete

**3. Click edit to within the record to amend the dates of attendance and renewal to correspond the new renewal dates**

**2. The uploaded file will appear here – DO NOT DELETE THE PREVIOUS CERTIFICATE**

**4. Adding a different competency**

Each competency will require its own training record, this will allow each competency to have its own reminder when it is due to expire. Repeat the process from step 2 of this document, making sure that the uploaded certificates are clearly labelled to allow you to tell the difference at a glance:

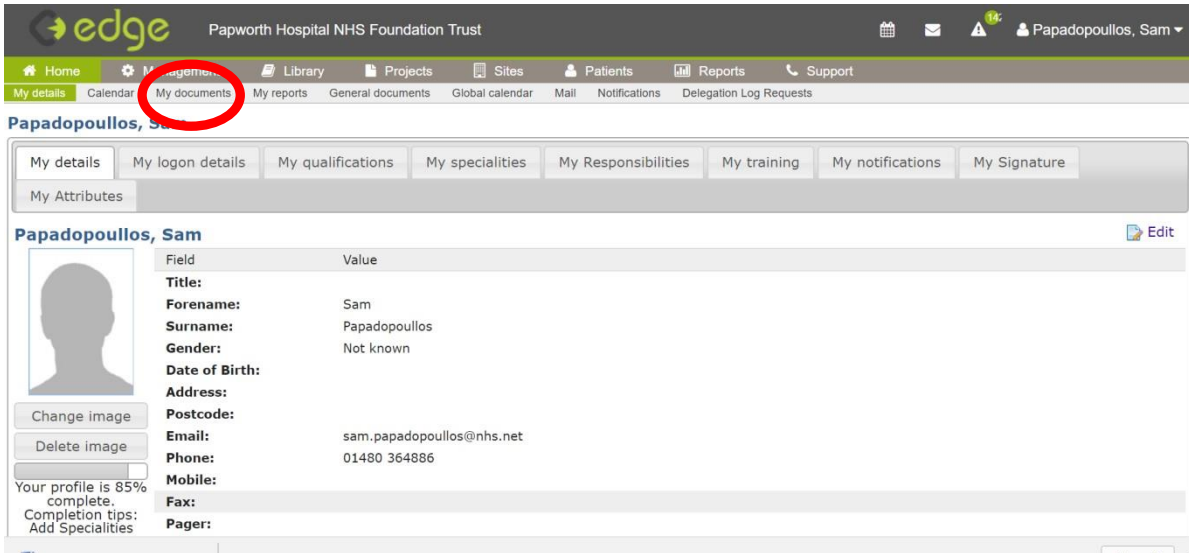
**My training**

Course type	Course name	Location	Date attended	Length (in days)	Date of renewal	Renew History	Filename	Version	Add file
Competency Training (Please ensure file name is descriptive before uploading)	Competency Training		10/08/2017		10/08/2018	Renew History Edit	Competency course 1 example.docx		Add file Edit Delete
							Competency course 1 update example.docx		Edit Delete
Competency Training (Please ensure file name is descriptive before uploading)	Competency Training		10/08/2017		16/06/2018	Renew History Edit	Competency course 2 example.docx		Add file Edit Delete
CV (please attach)	CV		10/05/2017			Renew History Edit	CV example.docx		Add file Edit Delete

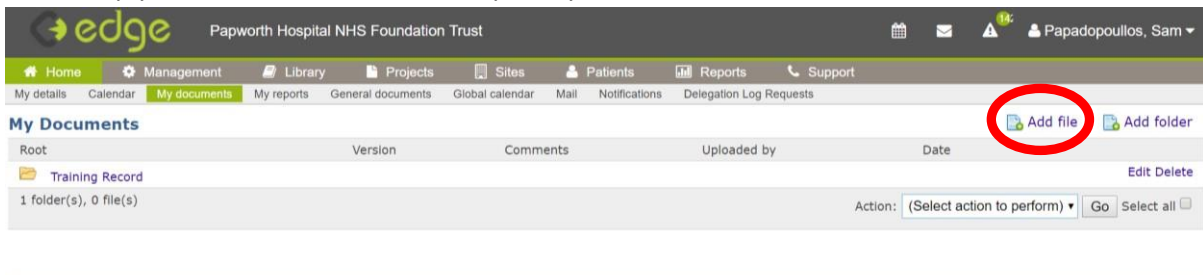
### 5. Adding other Certificates

If you wish to add certificates for non-compulsory training (e.g. internal courses led by the Library/Leadership team):

Go to the 'my documents' tab on the home page:



Next, simply click the add file button to upload your certificates:



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SO16 5AF, United Kingdom

If you would prefer to keep certain certificates grouped together, please refer to “EDGE TUTORIAL 3 – CREATING YOUR TRAINING RECORD” if you require step by step instructions on how to create a folder to store all related documents together.

**PART TWO**

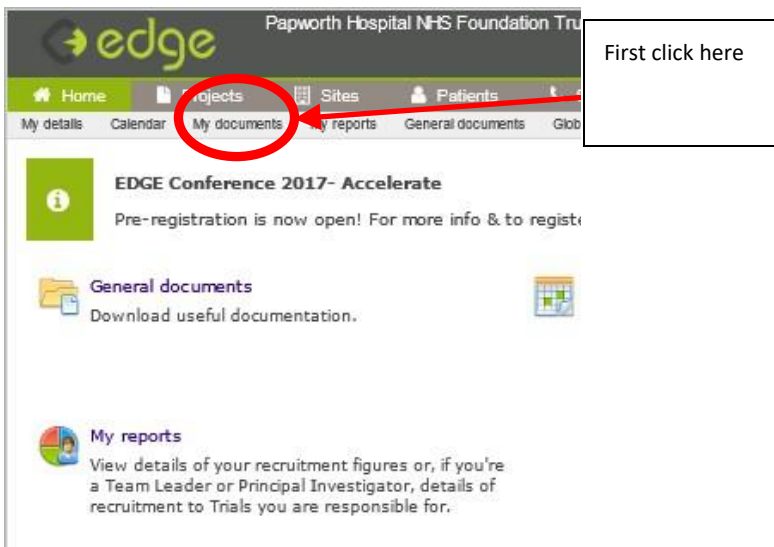
**EDGE – Creating your Training Record**

**Brief Intro**

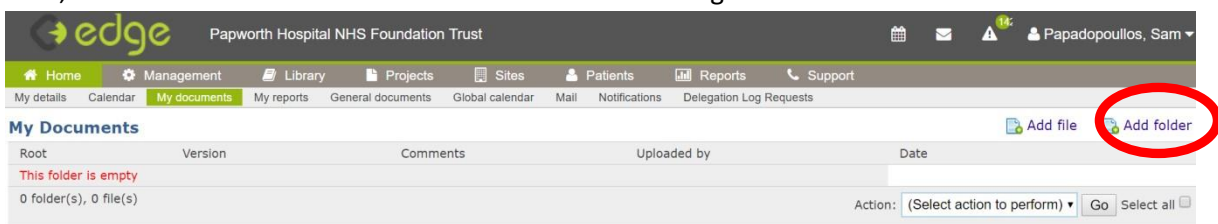
This guidance explains how to create a folder for your training record, and how to upload documents to it.

**1. Creating the folder**

The training record folder is created in the ‘My Documents’ tab:

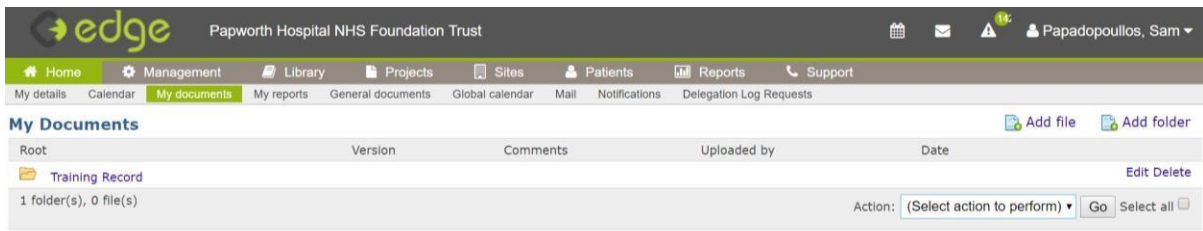


Next, click on add folder and create a folder named ‘Training record’:



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 SO16 5AF, United Kingdom

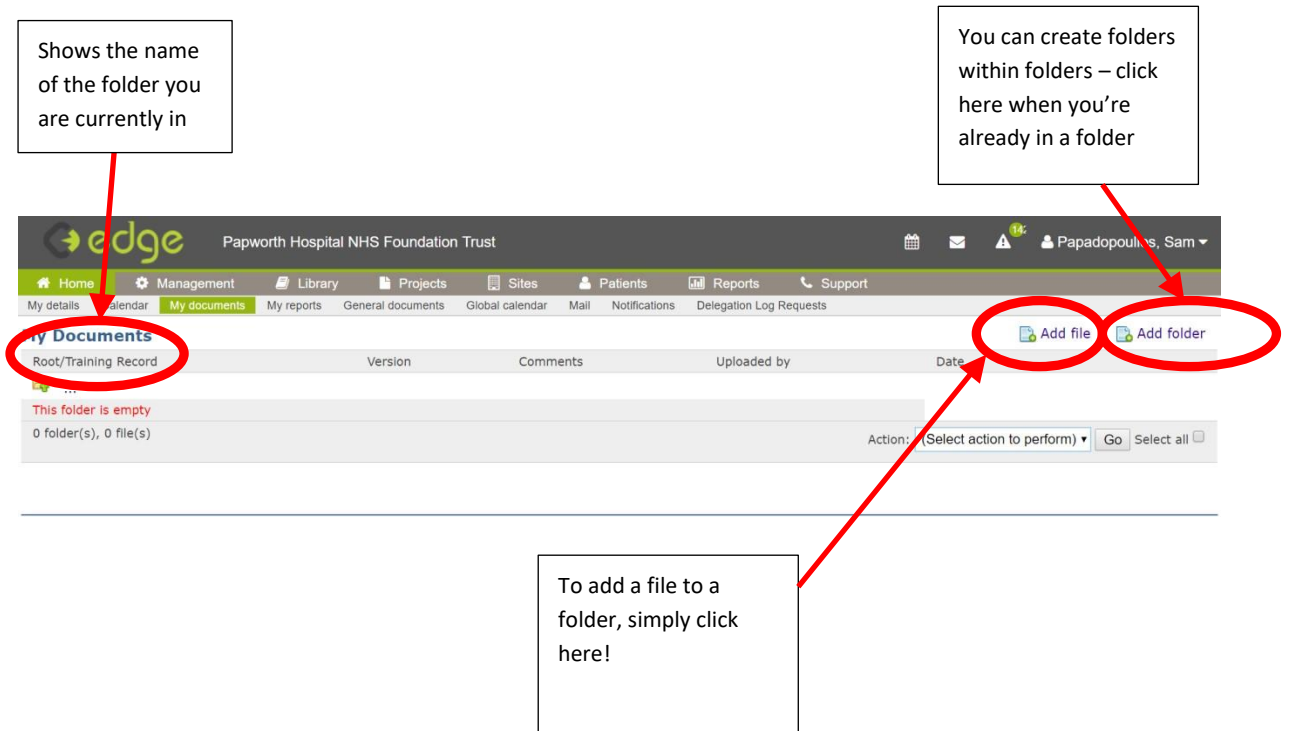
The training record folder should then appear in the list:



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SO16 5AF, United Kingdom

## 2. Adding files to the folder

Click on the folder name to open it, then click 'add files' to upload the required documents:



You can use the instructions above to create folders for any groups of documents you wish to store on EDGE, simply create a folder with the appropriate name and you're ready to upload documents.