

Understanding your dashboard and timeline

A guide for doctors gathering evidence for a Portfolio Pathway application

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Your dashboard

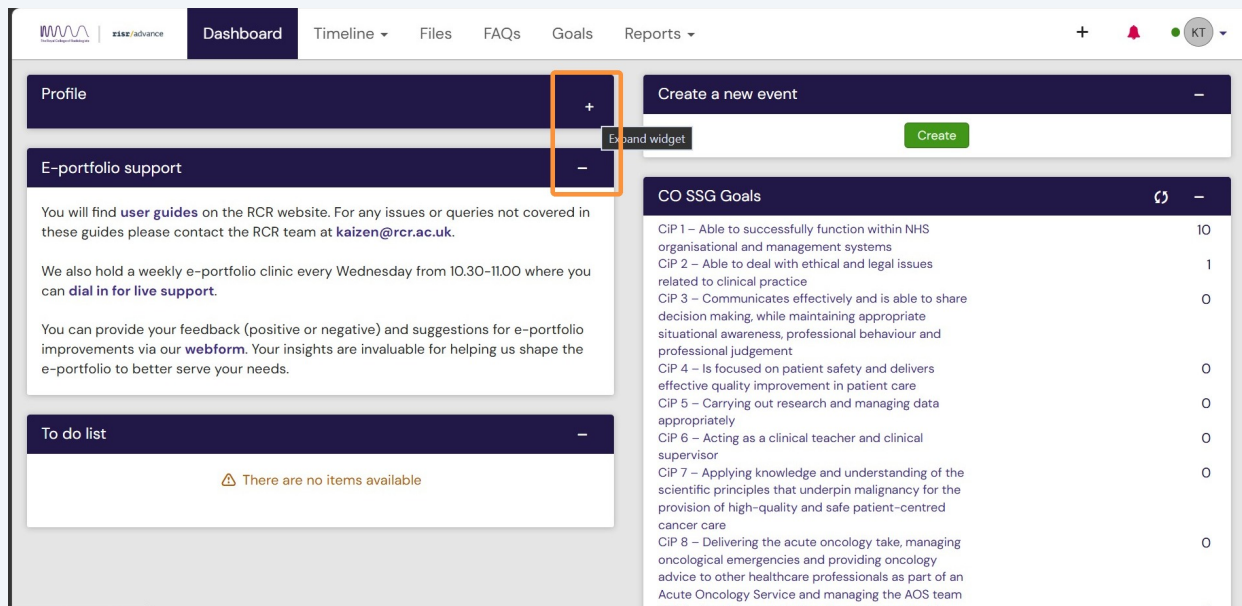
1

When you log in to the e-portfolio you will be taken to your dashboard.

Your dashboard has a number of features for quick and easy access to key functions.

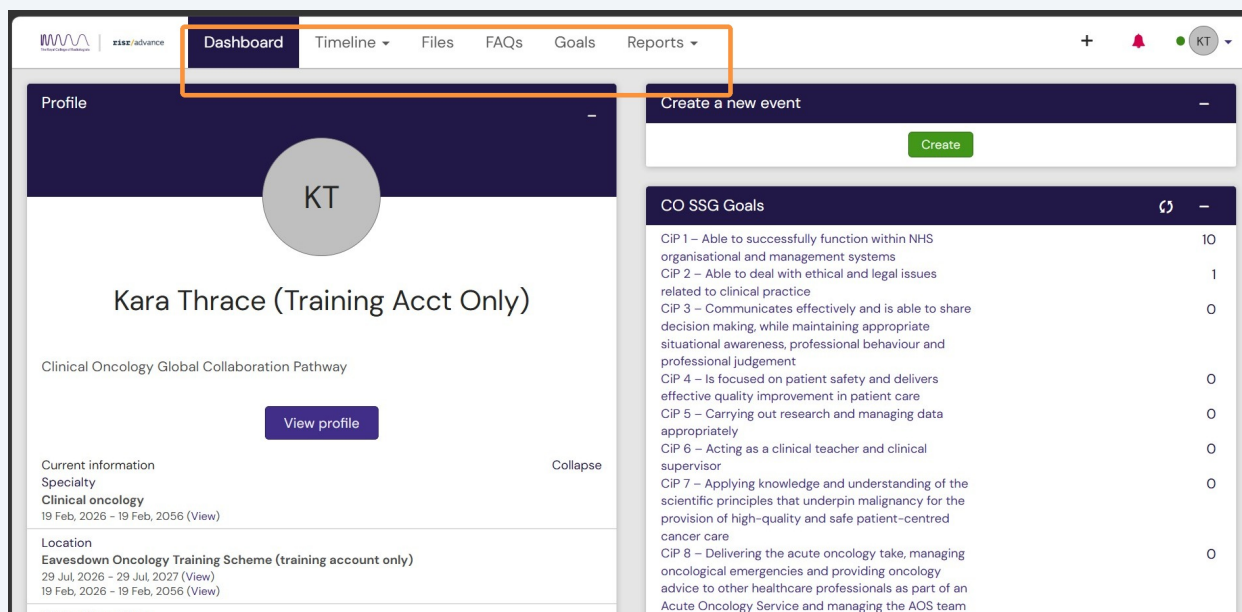
2

Your dashboard is made up of sections called tile. You can collapse and hide any tile by clicking the "-" symbol in the title bar. You can expand sections by clicking on the "+" symbol.



3

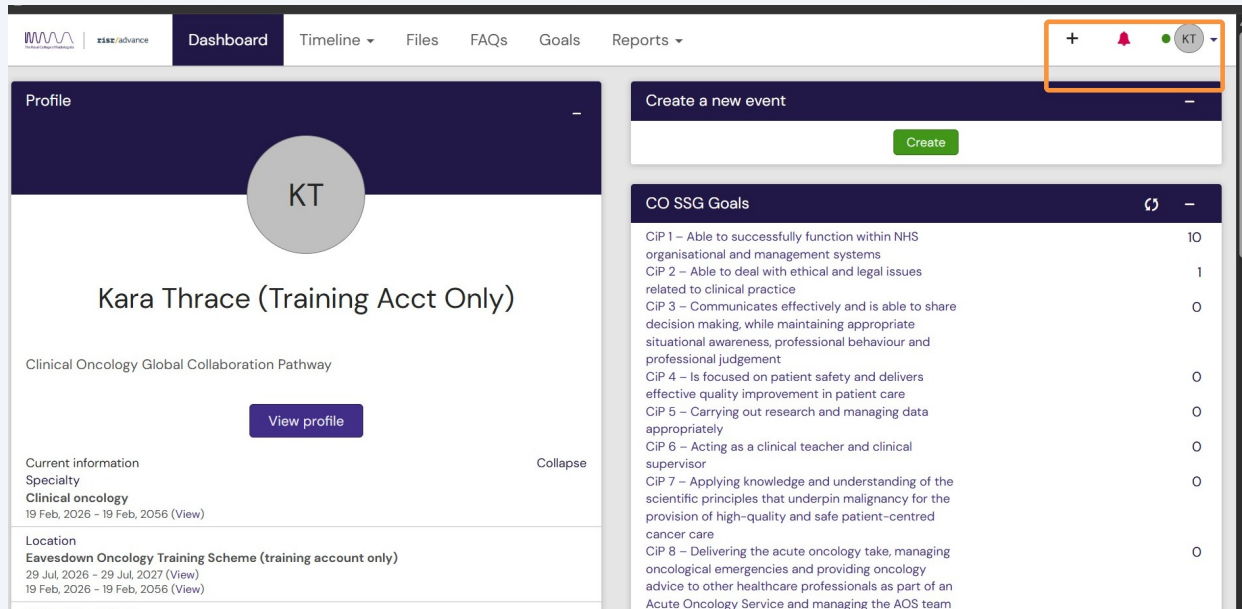
The task bar will always be at the top of your screen regardless of what you are viewing. Clicking on "Dashboard" within the task bar will always return you to your dashboard view.



4

The icons in the top right hand corner take you to key sections of your e-portfolio. The "+" symbol allows you to create a new event, the bell icon will take you to your inbox and to do list, and the circle with your initials allows you to log out or view your profile.

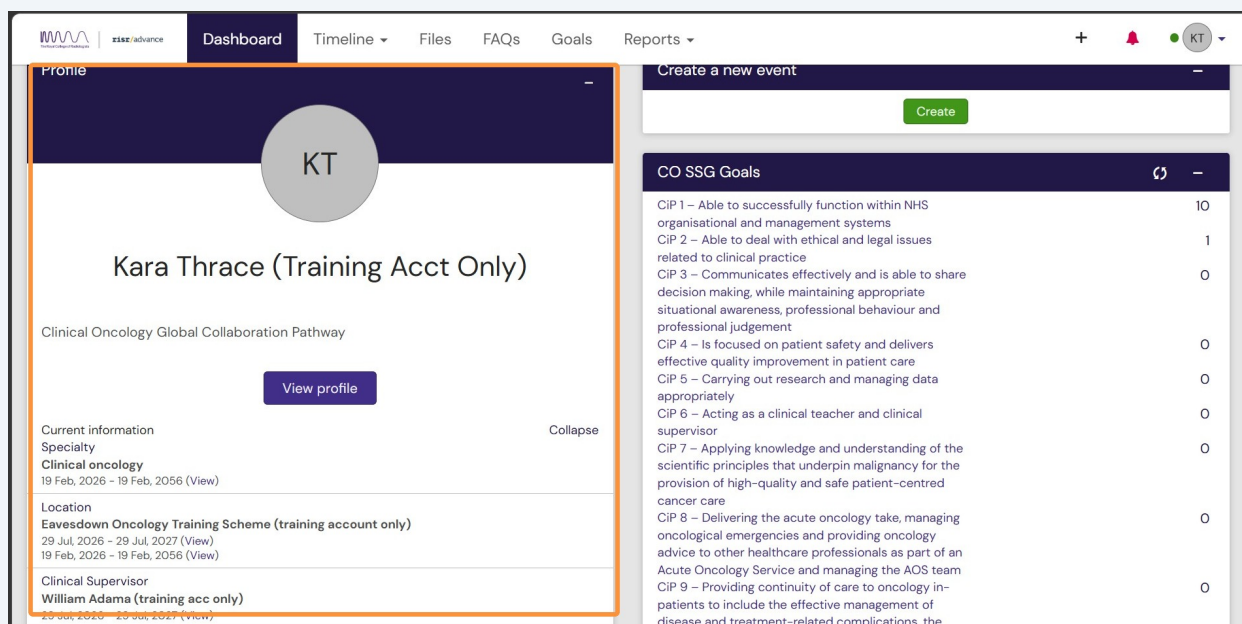
The bell icon will appear red if you have new inbox messages or items in your to do list.



Your profile

5

Your profile tile summarises current information related to your account, such as your specialty, location, and supervisors.



6

Click on view next to any of this information to open the full view of this information for further details.

Profile

KT

Kara Thrace (Training Acct Only)

Clinical Oncology Global Collaboration Pathway

[View profile](#)

Current information Collapse

Specialty
Clinical oncology
19 Feb, 2026 - 19 Feb, 2056 ([View](#))

Location
Eavesdown Oncology Training Scheme (training account only)
29 Jul, 2026 - 29 Jul, 2027 ([View](#))
19 Feb, 2026 - 19 Feb, 2056 ([View](#))

Clinical Supervisor
William Adama (training acc only)
29 Jul, 2026 - 29 Jul, 2027 ([View](#))

Create a new event

[Create](#)

CO SSG Goals

Goal	Score
CIP 1 - Able to successfully function within NHS organisational and management systems	10
CIP 2 - Able to deal with ethical and legal issues related to clinical practice	1
CIP 3 - Communicates effectively and is able to share decision making, while maintaining appropriate situational awareness, professional behaviour and professional judgement	0
CIP 4 - Is focused on patient safety and delivers effective quality improvement in patient care	0
CIP 5 - Carrying out research and managing data appropriately	0
CIP 6 - Acting as a clinical teacher and clinical supervisor	0
CIP 7 - Applying knowledge and understanding of the scientific principles that underpin malignancy for the provision of high-quality and safe patient-centred cancer care	0
CIP 8 - Delivering the acute oncology take, managing oncological emergencies and providing oncology advice to other healthcare professionals as part of an Acute Oncology Service and managing the AOS team	0
CIP 9 - Providing continuity of care to oncology in-patients to include the effective management of disease and treatment-related complications, the	0

7

You can click on view profile to view your user information and change your password.

Profile

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Create a new event

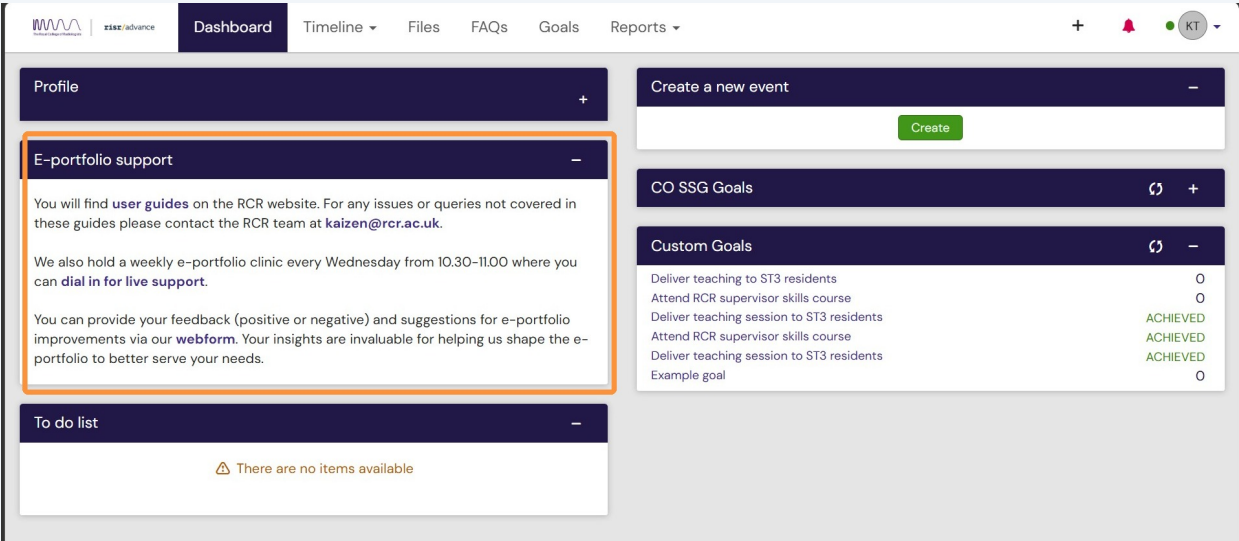
[Create](#)

CO SSG Goals

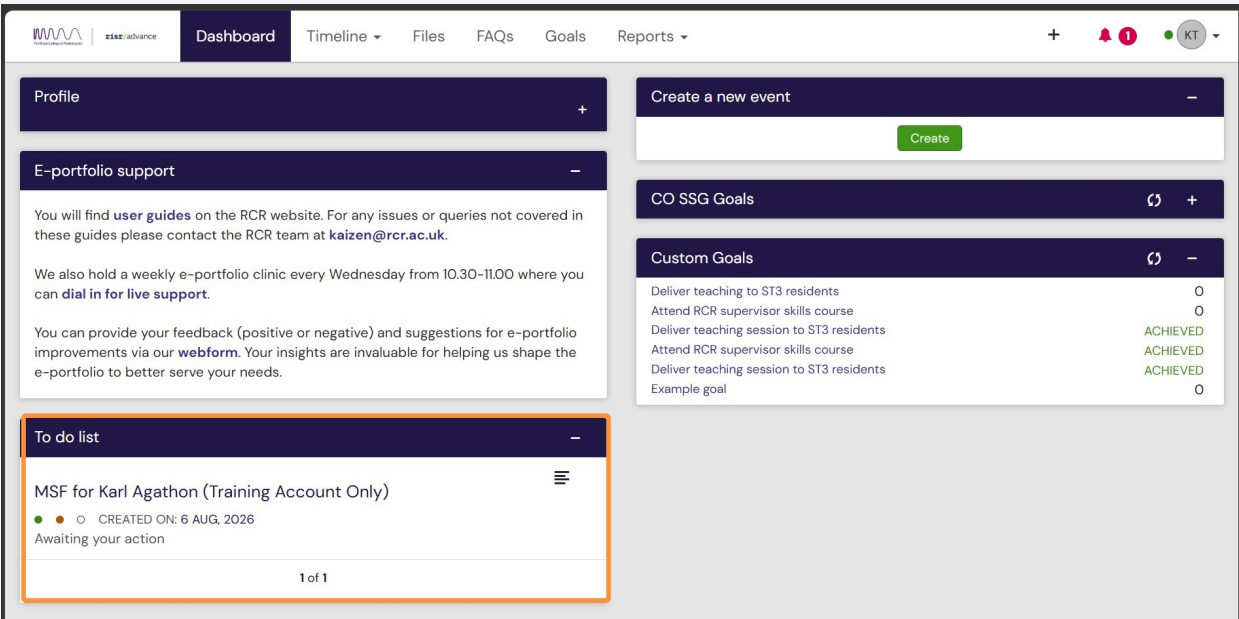
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CIP 8 - Delivering the acute oncology take, managing oncological emergencies and providing oncology advice to other healthcare professionals as part of an Acute Oncology Service and managing the AOS team	0
CIP 9 - Providing continuity of care to oncology in-patients to include the effective management of	0

Other dashboard tiles

8 The "E-portfolio support" tile shows you options for accessing support with your e-portfolio



9 The "To do list" tile will show you any forms awaiting your action (e.g. assessments you have been asked to complete for other doctors). Clicking the event will take you to the full view where you can complete the required actions.



10

You can create a new event, such as an assessment or reflection, by clicking the green "Create button"

The screenshot shows the RCR dashboard with a dark blue header. The 'Create a new event' button is highlighted with an orange box. The dashboard includes sections for Profile, E-portfolio support, To do list, CO SSG Goals, and Custom Goals.

Profile

E-portfolio support

You will find **user guides** on the RCR website. For any issues or queries not covered in these guides please contact the RCR team at kaizen@rcr.ac.uk.

We also hold a weekly e-portfolio clinic every Wednesday from 10.30-11.00 where you can **dial in for live support**.

You can provide your feedback (positive or negative) and suggestions for e-portfolio improvements via our **webform**. Your insights are invaluable for helping us shape the e-portfolio to better serve your needs.

To do list

⚠ There are no items available

Create a new event

Create

CO SSG Goals

Custom Goals

Deliver teaching to ST3 residents	0
Attend RCR supervisor skills course	0
Deliver teaching session to ST3 residents	ACHIEVED
Attend RCR supervisor skills course	ACHIEVED
Deliver teaching session to ST3 residents	ACHIEVED
Example goal	0

11

The "SSG Goals" and "Custom Goals" tiles give you an overview of your progress towards your goals. Clicking on an individual goal will take you to its full view for further detail.

The screenshot shows the RCR dashboard with a dark blue header. The 'CO SSG Goals' and 'Custom Goals' tiles are highlighted with an orange box. The dashboard includes sections for Profile, E-portfolio support, To do list, CO SSG Goals, and Custom Goals.

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CO SSG Goals

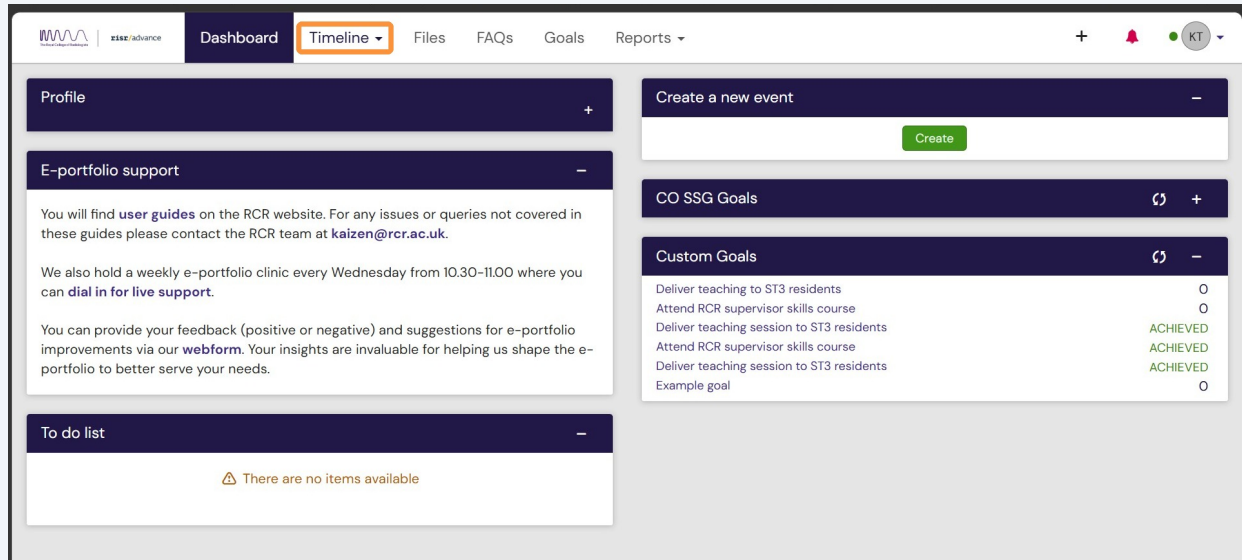
Custom Goals

Deliver teaching to ST3 residents	0
Attend RCR supervisor skills course	0
Deliver teaching session to ST3 residents	ACHIEVED
Attend RCR supervisor skills course	ACHIEVED
Deliver teaching session to ST3 residents	ACHIEVED
Example goal	0

Your timeline

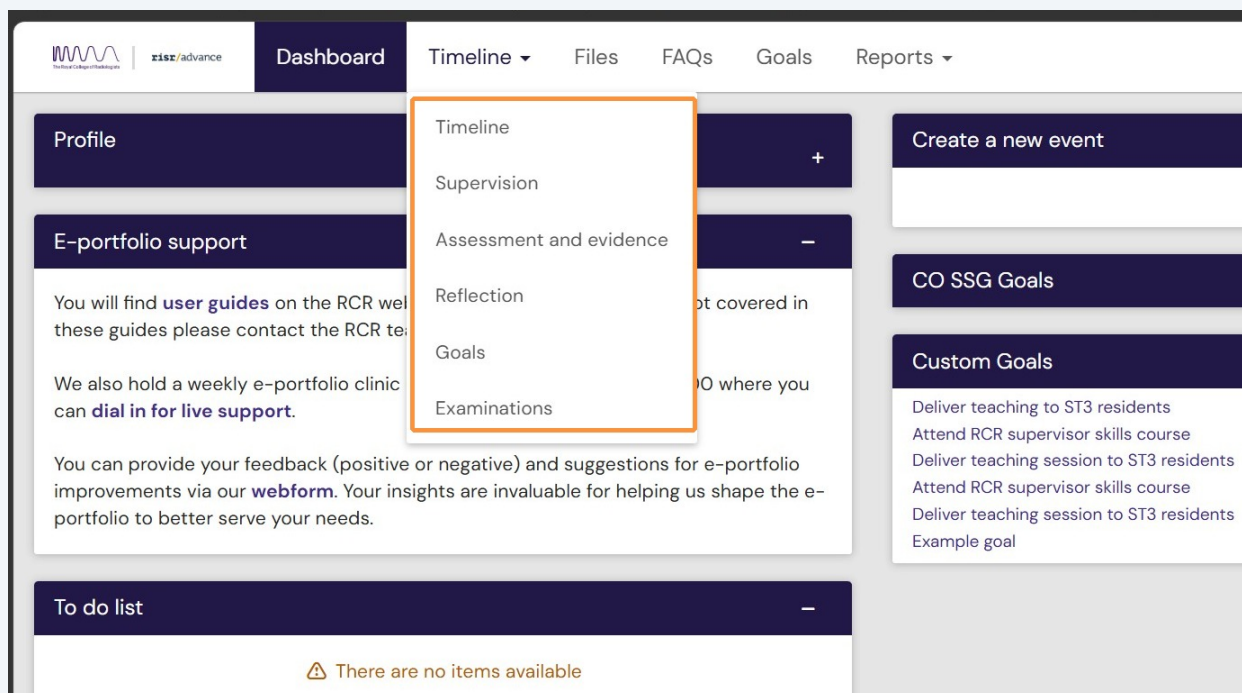
12

You can access your timeline from the task bar. Your timeline will show you all of the events that have been created on your e-portfolio



13

Clicking on "Timeline" will give you options to view your full timeline or to view events by category.



14

You can change the order in which events appear in your timeline by clicking the "Ordered by" menu.

The screenshot shows the WAVE timeline interface. At the top, there's a navigation bar with 'Dashboard', 'Timeline', 'Files', 'FAQs', 'Goals', and 'Reports'. Below the navigation bar, there's a search bar with the placeholder text 'Start typing to search' and a 'Search' button. To the right of the search bar is a 'Bulk tagging' link. Below the search bar, it says 'Found 58 items'. The main timeline area shows a list of events. The first event is 'Reflection', created on 6 AUG, 2026. Below it are 'Assign educational supervisor' and 'Custom goals'. The 'Ordered by' dropdown menu is highlighted with an orange box, showing 'date created' as the selected option. On the right side, there's a sidebar with a 'Bookmark title' field, a 'Bookmark current search' button, and an 'Advanced search' section with various filters like 'Event type', 'State', 'Date after', 'Date before', 'Evidence focus', and 'Supervision level'. An 'Apply' button is at the bottom of the sidebar.

15

You can search for events using the simple search above your timeline or the advanced search to the right of your timeline.

This screenshot is similar to the previous one, showing the WAVE timeline interface. The search bar at the top is highlighted with an orange box. The 'Advanced search' section on the right is also highlighted with an orange box, showing various filters like 'Event type', 'State', 'Date after', 'Date before', 'Evidence focus', and 'Supervision level'. The 'Apply' button at the bottom of the sidebar is also highlighted. The timeline area shows the same list of events as before.

16

Completed events appear with a green bar on the left. events that are in progress or saved as draft will appear with an orange bar on the left. Clicking on the title of any event will take you to its detailed view.

The screenshot shows the 'Timeline' view of the xist/advance system. The top navigation bar includes 'Dashboard', 'Timeline', 'Files', 'FAQs', 'Goals', and 'Reports'. The main content area displays a list of events. The first event, 'Case-based Discussion (CbD)', has a green bar on the left and a status of 'Awaiting response from William Adama (training acc only)'. The second event, 'Acute Care Assessment Tool', has an orange bar on the left and a status of 'Common tumour type, Palliative care'. The third event, 'Custom goals', has a green bar on the left and a status of '13 MAY, 2026'. Each event card includes a 'Show audit log' button and a 'Preview' button.

17

You can view the progress of events using the dots next to each event. Each dot represents a stage in the process and the colour tells you the status of that stage:

- Green dots indicate a completed stage.
- White dots with an orange outline show a section that is awaiting a response. You can see who needs to respond to incomplete sections underneath the dots.
- Filled orange dots are sections that are in progress or saved in draft form.
- Grey dots show sections that have been skipped.

The screenshot shows the 'Timeline' view of the xist/advance system. The top navigation bar includes 'Dashboard', 'Timeline', 'Files', 'FAQs', 'Goals', and 'Reports'. The main content area displays a list of events. The first event, 'Case-based Discussion (CbD)', has a green bar on the left and a status of 'Awaiting response from William Adama (training acc only)'. The second event, 'Acute Care Assessment Tool', has an orange bar on the left and a status of 'Common tumour type, Palliative care'. The third event, 'Custom goals', has a green bar on the left and a status of '13 MAY, 2026'. Each event card includes a 'Show audit log' button and a 'Preview' button.

18

You can send a reminder to anyone who you are awaiting a response from by clicking on "Remind" You can also retract the event if you need to edit or discard it.

The screenshot shows the 'Timeline' tab in the xist/advance application. The interface includes a top navigation bar with 'Dashboard', 'Timeline' (selected), 'Files', 'FAQs', 'Goals', and 'Reports'. A left sidebar contains icons for 'Filter' and 'Delete'. The main content area displays a list of events:

- Case-based Discussion (CbD)**: Created on 7 JUL, 2026. Status: Awaiting response from William Adama (training acc only). Supervision level: Observed only. Basis for discussion: Discharge summary. Action buttons: **Remind** (highlighted with an orange box), **Retract**, and **Show audit log**. A **Preview** link is also present.
- Acute Care Assessment Tool**: Created on 7 JUL, 2026. Evidence focus: Common tumour type, Palliative care. Supervision level: Indirectly supervised. Action buttons: **Show audit log** and **Preview**.
- Custom goals**: Created on 13 MAY, 2026. Action buttons: **Show audit log** and **Preview**.

A section header 'Events created in May 2026' is visible between the second and third event cards.