

Understanding your dashboard and timeline

A guide for trainers

32 Steps

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STEP 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. If you have multiple roles (e.g. supervisor and ARCP panel member) you may have more than one dashboard available to you

Changing your dashboard view

3 Steps

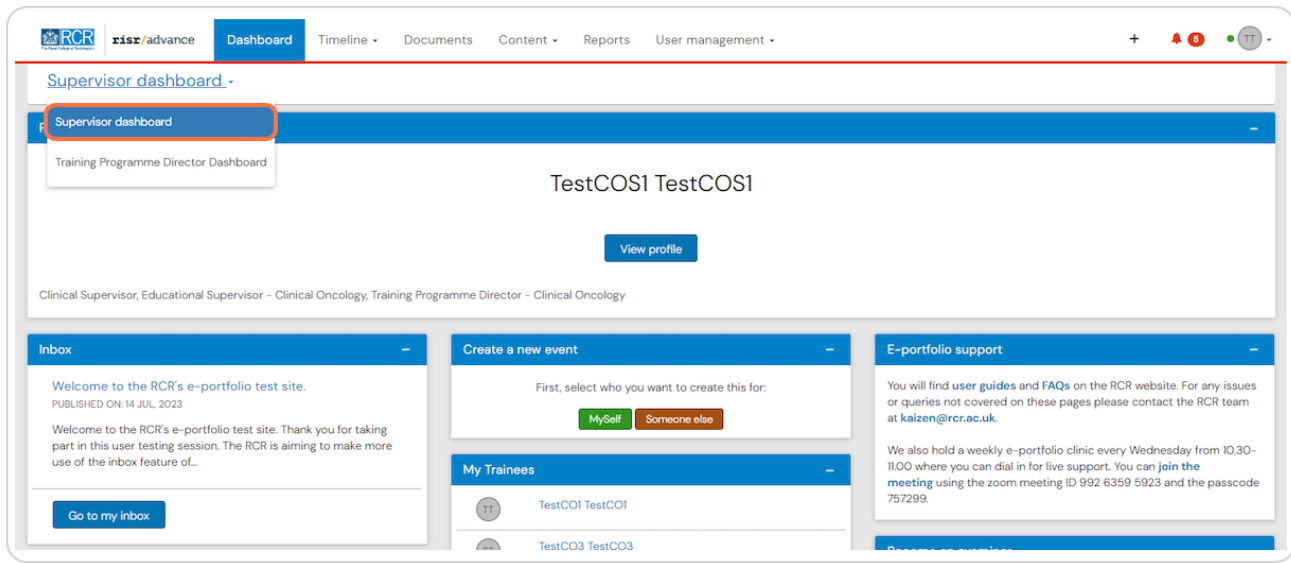
STEP 2

Your current dashboard is shown in the top left corner. Clicking on this will show a list of your available dashboard views

The screenshot shows the RCR e-portfolio dashboard interface. At the top, there is a navigation bar with the RCR logo, 'risz/advance', and a 'Dashboard' menu. The 'Dashboard' menu is highlighted, and a dropdown arrow is visible. Below the navigation bar, the main content area displays the user's profile information for 'TestCOS1 TestCOS1'. The profile section includes a 'View profile' button and a list of roles: 'Clinical Supervisor, Educational Supervisor - Clinical Oncology, Training Programme Director - Clinical Oncology'. Below the profile section, there are three main dashboard widgets: 'Inbox', 'Create a new event', and 'E-portfolio support'. The 'Inbox' widget contains a welcome message and a 'Go to my inbox' button. The 'Create a new event' widget has a 'First, select who you want to create this for:' prompt with 'MySelf' and 'Someone else' buttons. The 'E-portfolio support' widget provides information about user guides, FAQs, and a weekly e-portfolio clinic. The 'Supervisor dashboard' dropdown menu is highlighted in the top left corner of the dashboard area.

STEP 3

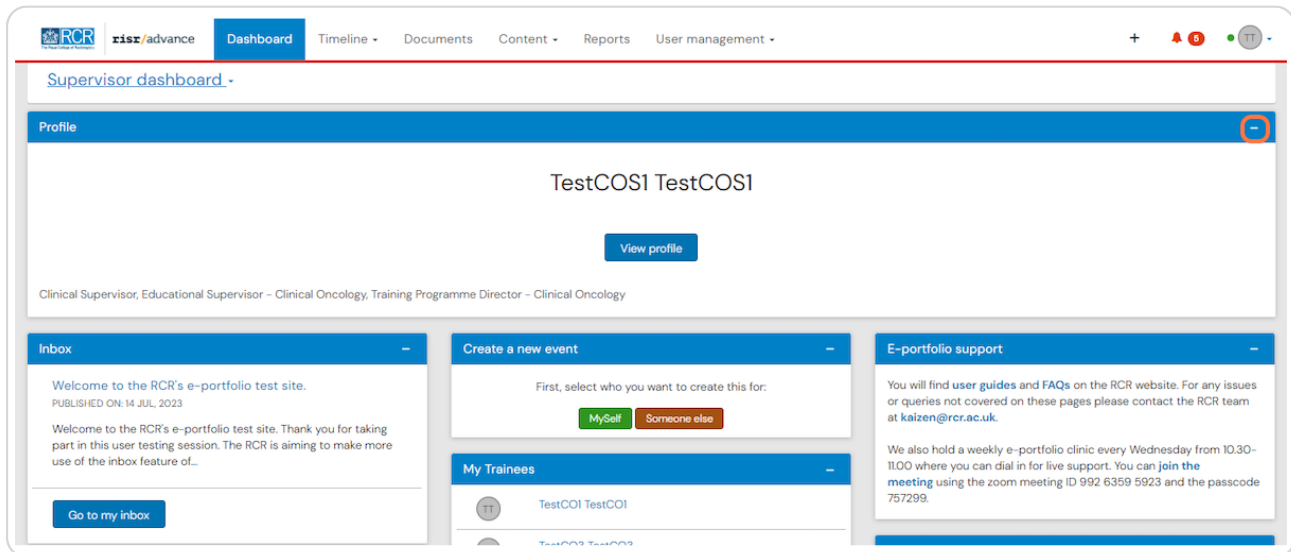
Click on the required dashboard to view it



The screenshot shows the RCR Supervisor dashboard interface. At the top, there is a navigation bar with the RCR logo, 'risz/advance', and a 'Dashboard' menu. Below this, the main content area is titled 'Supervisor dashboard'. A blue bar at the top of the main content area contains the text 'Supervisor dashboard' and a minus sign. Below this bar, the text 'Training Programme Director Dashboard' is visible. The main content area displays 'TestCOS1 TestCOS1' and a 'View profile' button. Below this, there is a section for 'Clinical Supervisor, Educational Supervisor - Clinical Oncology, Training Programme Director - Clinical Oncology'. The dashboard is divided into three columns: 'Inbox', 'Create a new event', and 'E-portfolio support'. The 'Inbox' section contains a welcome message and a 'Go to my inbox' button. The 'Create a new event' section has a dropdown menu with 'MySelf' and 'Someone else' options. The 'E-portfolio support' section contains information about user guides and FAQs, and a weekly e-portfolio clinic. The 'My Trainees' section is also visible, showing a list of trainees with a minus sign in the title bar.

STEP 4

You can collapse and hide any section of your dashboard by clicking the - symbol in the blue title bar

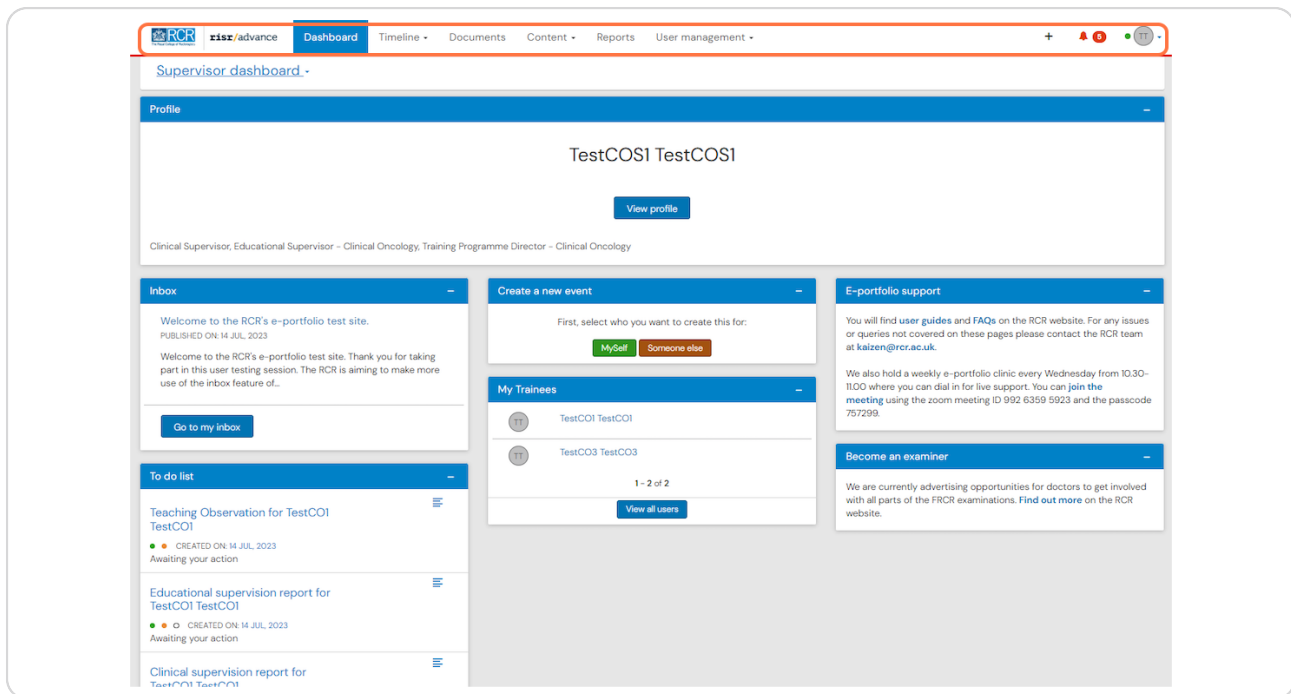


The screenshot shows the RCR Supervisor dashboard interface, similar to the previous one. The 'Supervisor dashboard' title bar is now collapsed, and the 'Profile' section is visible. The 'Profile' section has a blue title bar with a minus sign on the right side, which is highlighted with a red circle. The main content area displays 'TestCOS1 TestCOS1' and a 'View profile' button. Below this, there is a section for 'Clinical Supervisor, Educational Supervisor - Clinical Oncology, Training Programme Director - Clinical Oncology'. The dashboard is divided into three columns: 'Inbox', 'Create a new event', and 'E-portfolio support'. The 'Inbox' section contains a welcome message and a 'Go to my inbox' button. The 'Create a new event' section has a dropdown menu with 'MySelf' and 'Someone else' options. The 'E-portfolio support' section contains information about user guides and FAQs, and a weekly e-portfolio clinic. The 'My Trainees' section is also visible, showing a list of trainees with a minus sign in the title bar.

STEP 5

The task bar will always be at the top of your screen

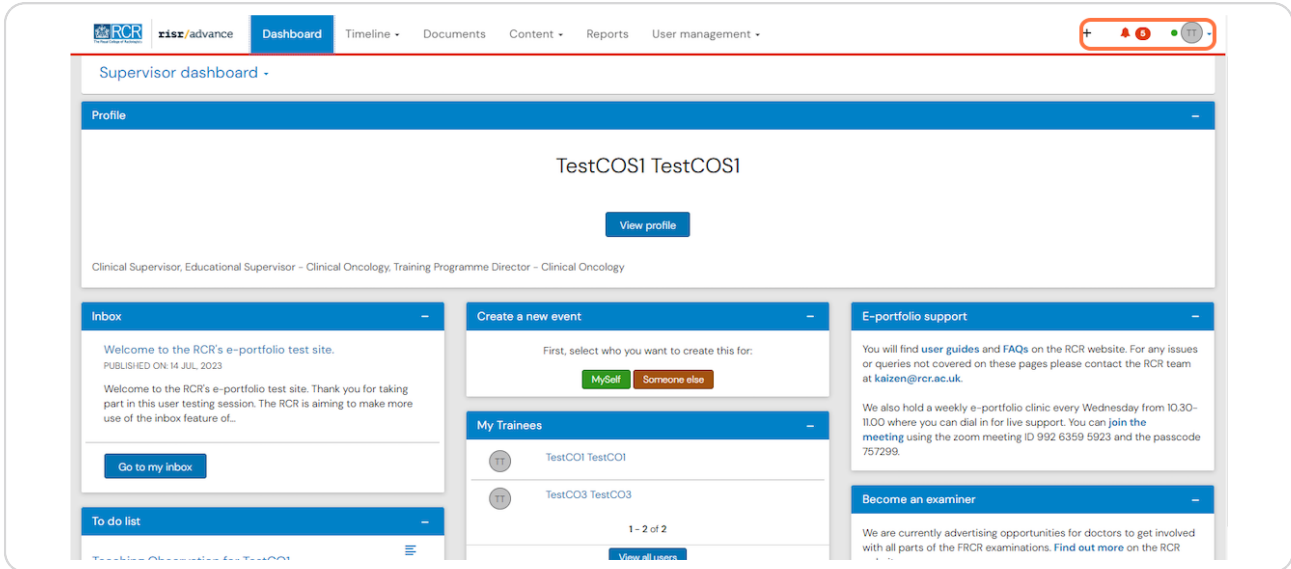
Clicking on Dashboard will always return you to your dashboard view.



STEP 6

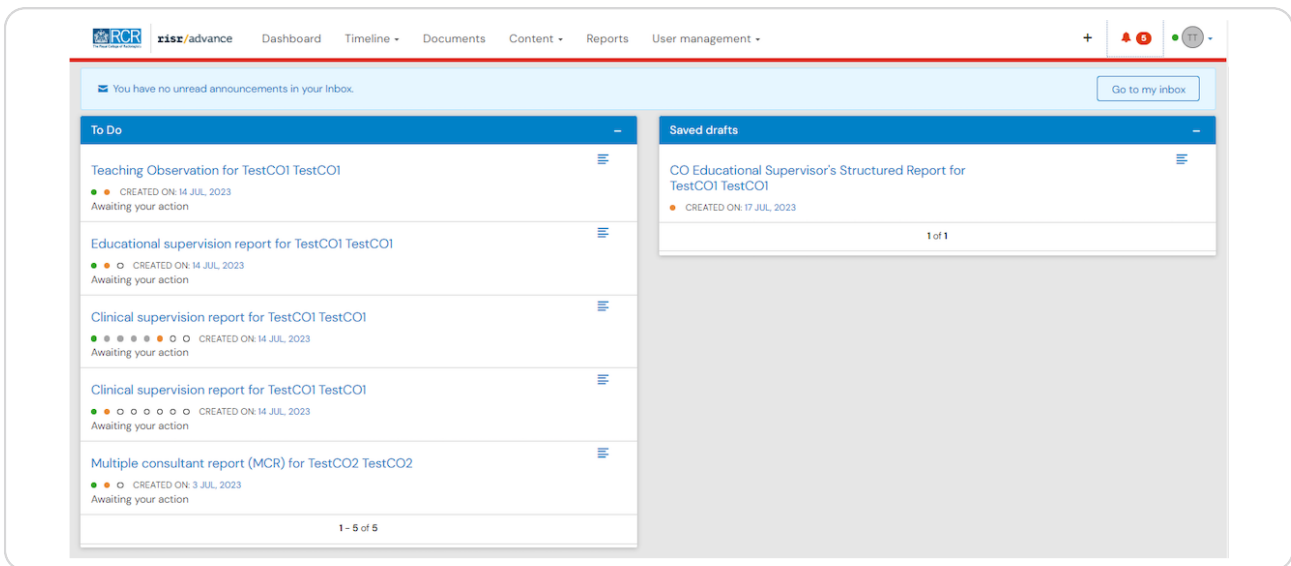
Icons in the top right hand corner take you to key sections of your e-portfolio

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.



STEP 7

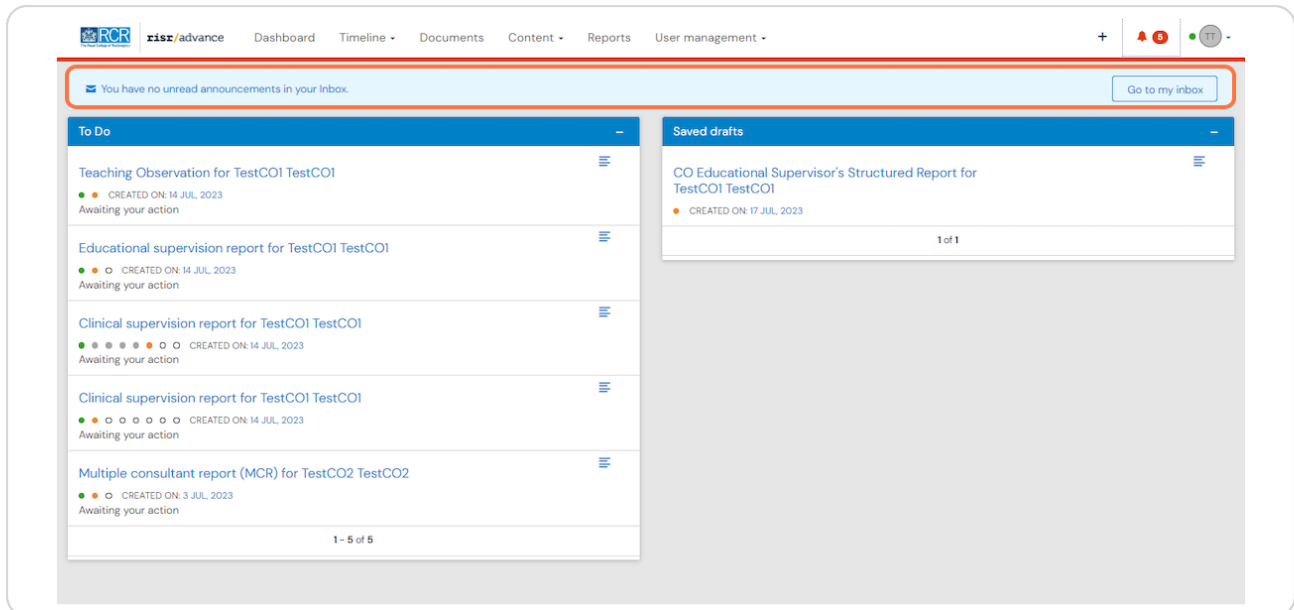
Clicking on the bell icon will take you to the alerts screen, which provides a summary view of your inbox, to do list and drafts



STEP 8

The banner will tell you if you have unread messages in your inbox

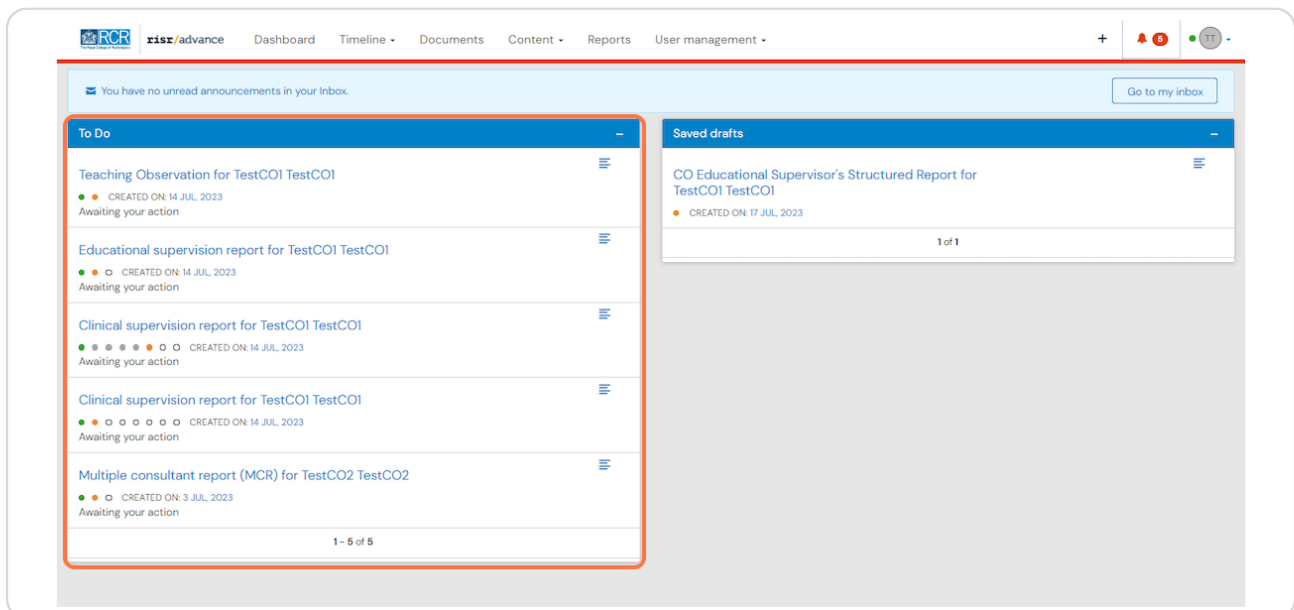
Clicking on Go to my inbox will take you to your messages.



STEP 9

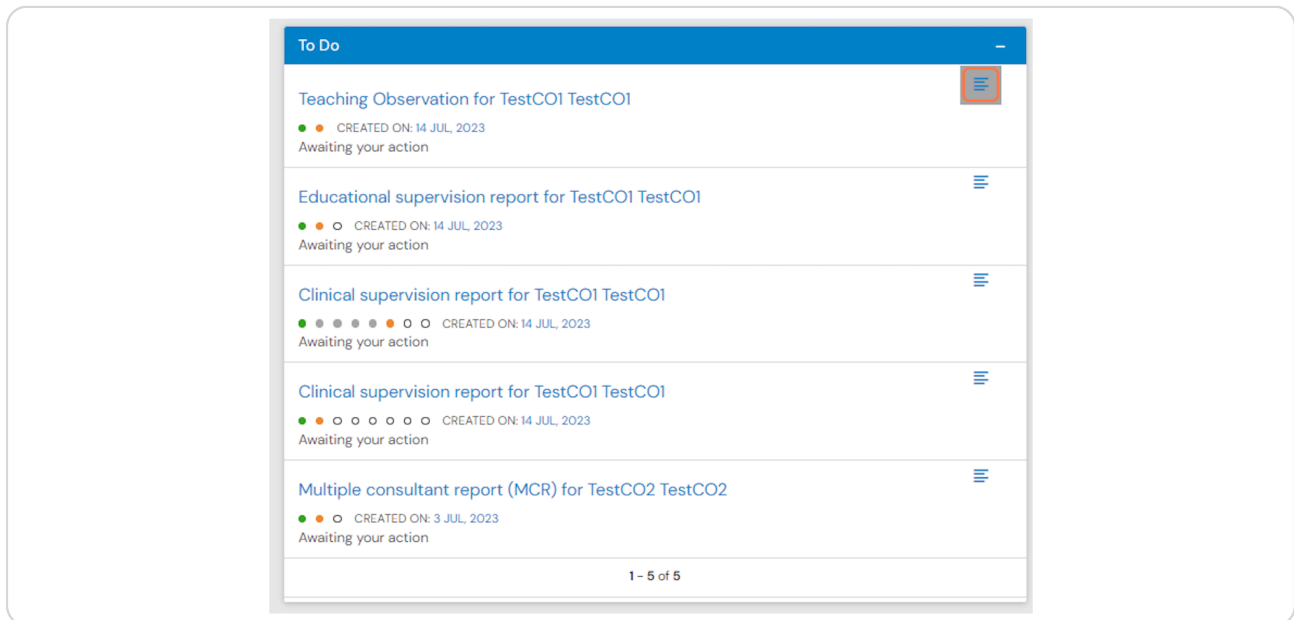
Your to do list shows all forms that are awaiting your input

Clicking the title of the form will take you to it's full view.



STEP 10

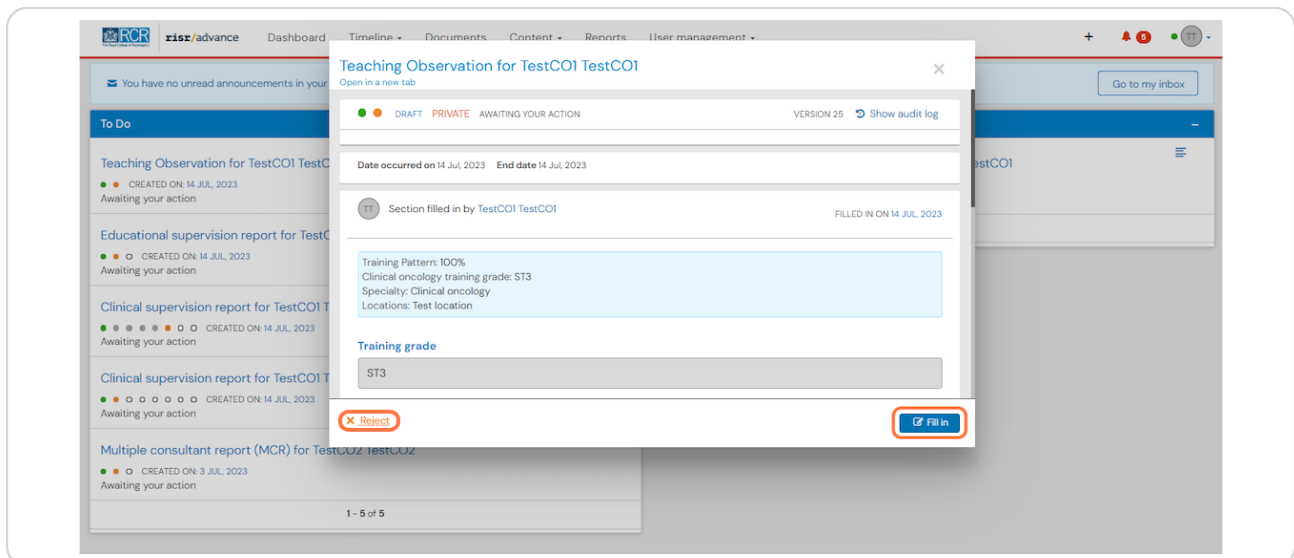
You can preview items in your to do list by clicking the icon to the right of the form name



STEP 11

The preview opens in a new window

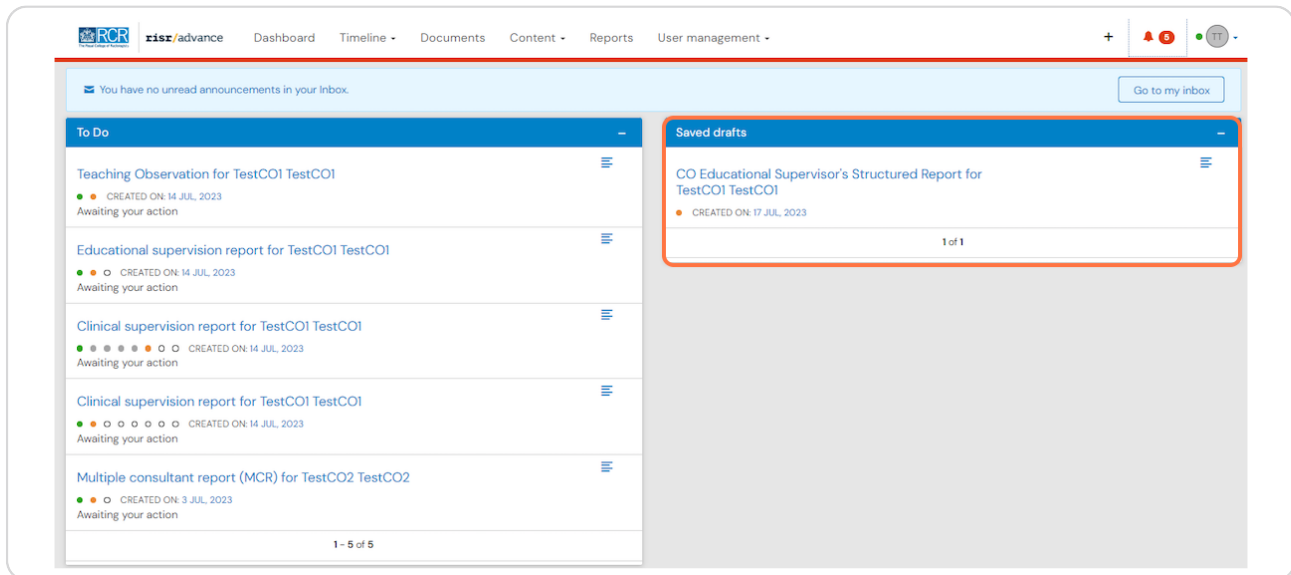
Clicking on fill in will allow you to complete the form within this window, without navigating away from your to do list. You can also click in reject to return the form without completing it. If you select this option you will be asked to provide an explanation.



STEP 12

You can also see your saved drafts from the alerts screen

You can click on these to open the full version or select the preview icon, as for to do list items



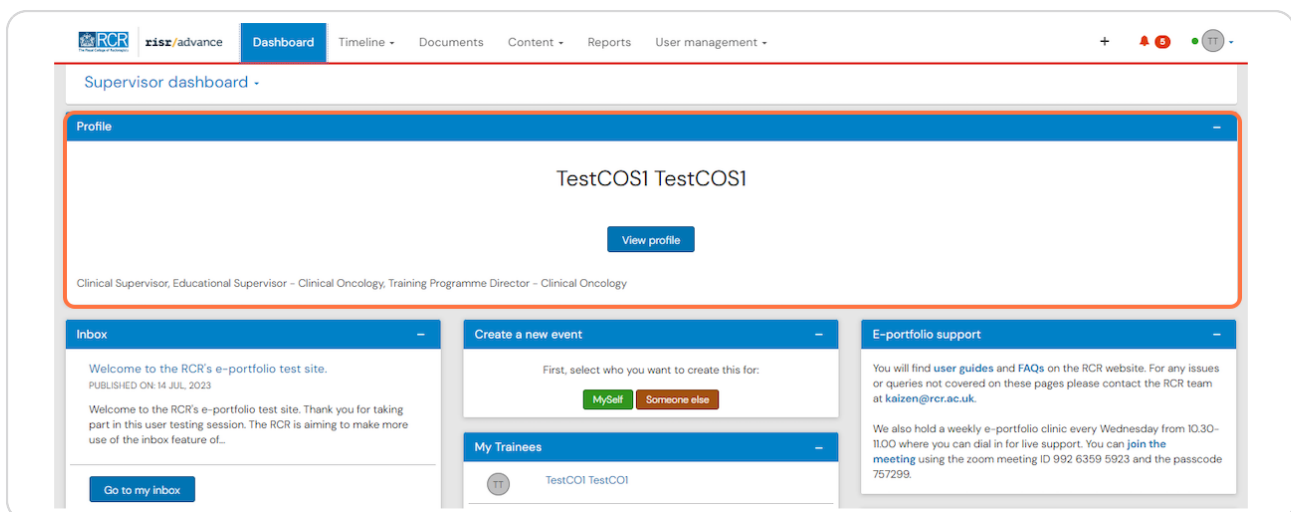
The screenshot shows the RCR 'risz/advance' interface. At the top, there's a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. Below this, a notification bar states 'You have no unread announcements in your inbox.' with a 'Go to my inbox' button. The main content area is divided into two columns. The left column, titled 'To Do', lists five items: 'Teaching Observation for TestCO1 TestCO1', 'Educational supervision report for TestCO1 TestCO1', 'Clinical supervision report for TestCO1 TestCO1', 'Clinical supervision report for TestCO1 TestCO1', and 'Multiple consultant report (MCR) for TestCO2 TestCO2'. Each item includes a progress indicator (colored dots) and the text 'Awaiting your action'. The right column, titled 'Saved drafts', contains one item: 'CO Educational Supervisor's Structured Report for TestCO1 TestCO1', also with a progress indicator and 'Awaiting your action'. A '1 of 1' indicator is visible at the bottom of the 'Saved drafts' section.

Your profile

2 Steps

STEP 13

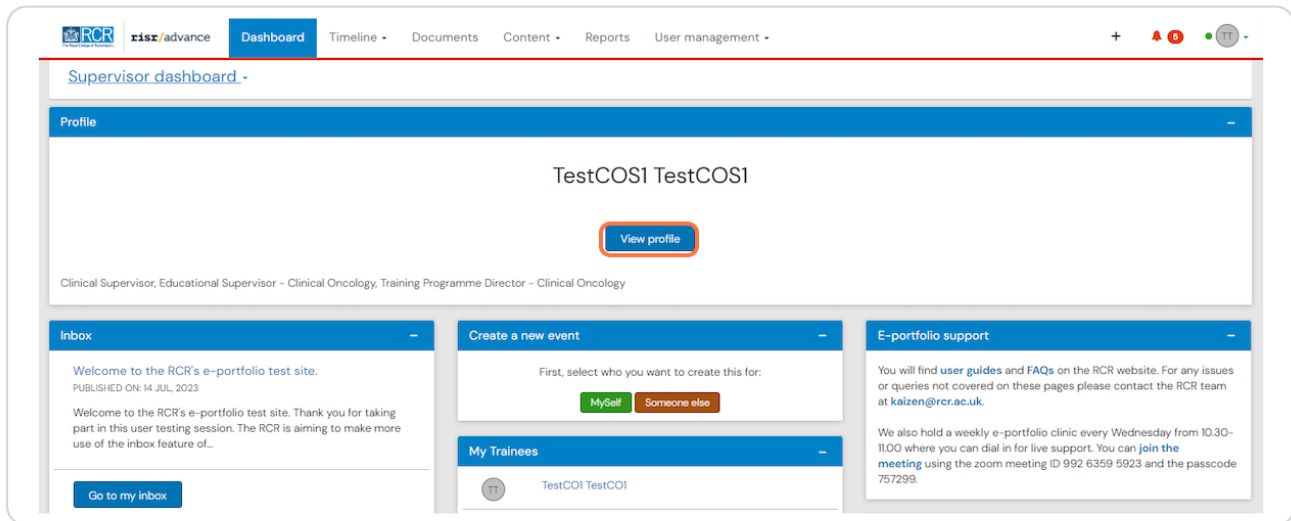
Your profile shows your current roles.



The screenshot shows the RCR 'risz/advance' interface with the 'Dashboard' tab selected. The main heading is 'Supervisor dashboard'. Below this, a large blue-bordered box displays the user's profile for 'TestCOS1 TestCOS1'. A 'View profile' button is centered below the name. Underneath the profile box, the user's roles are listed: 'Clinical Supervisor, Educational Supervisor - Clinical Oncology, Training Programme Director - Clinical Oncology'. Below the profile section, there are three main content areas. The left area is 'Inbox', containing a welcome message and a 'Go to my inbox' button. The middle area is 'Create a new event', with a prompt 'First, select who you want to create this for:' and two buttons: 'MySelf' (green) and 'Someone else' (orange). Below this is a 'My Trainees' section showing a single trainee: 'TestCO1 TestCO1'. The right area is 'E-portfolio support', providing information about user guides, FAQs, and contact details for the RCR team at 'kaizen@rcr.ac.uk'. It also mentions a weekly e-portfolio clinic on Wednesdays from 10.30-11.00.

STEP 14

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



The screenshot shows the RCR Supervisor dashboard. At the top, there is a navigation bar with the RCR logo, 'risz/advance', and a 'Dashboard' menu. Below the navigation bar, the page title is 'Supervisor dashboard'. The main content area is titled 'Profile' and displays the name 'TestCOSI TestCOSI'. A red box highlights the 'View profile' button. Below the profile section, there are three columns of widgets: 'Inbox' (with a 'Go to my inbox' button), 'Create a new event' (with 'MySelf' and 'Someone else' buttons), and 'E-portfolio support' (with text about user guides and FAQs). A 'My Trainees' section is also visible, showing a list of trainees with a 'View all users' button.

Other dashboard tiles

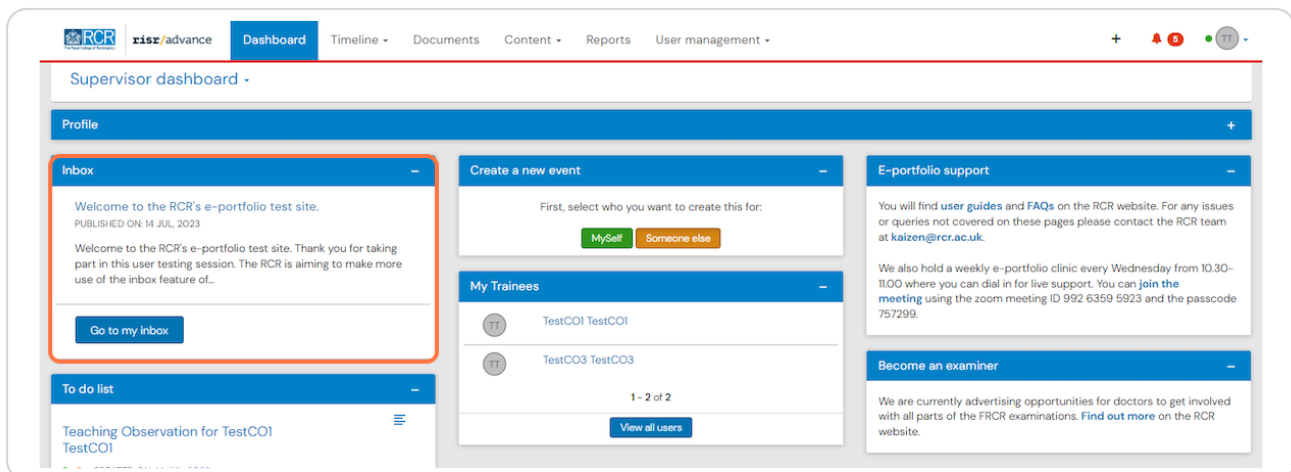
7 Steps

STEP 15

You can preview unread inbox messages from your dashboard

Click the message to view it or click Go to my inbox.

The RCR will use your e-portfolio inbox to share important information regarding training, curriculum updates etc. so please check this regularly

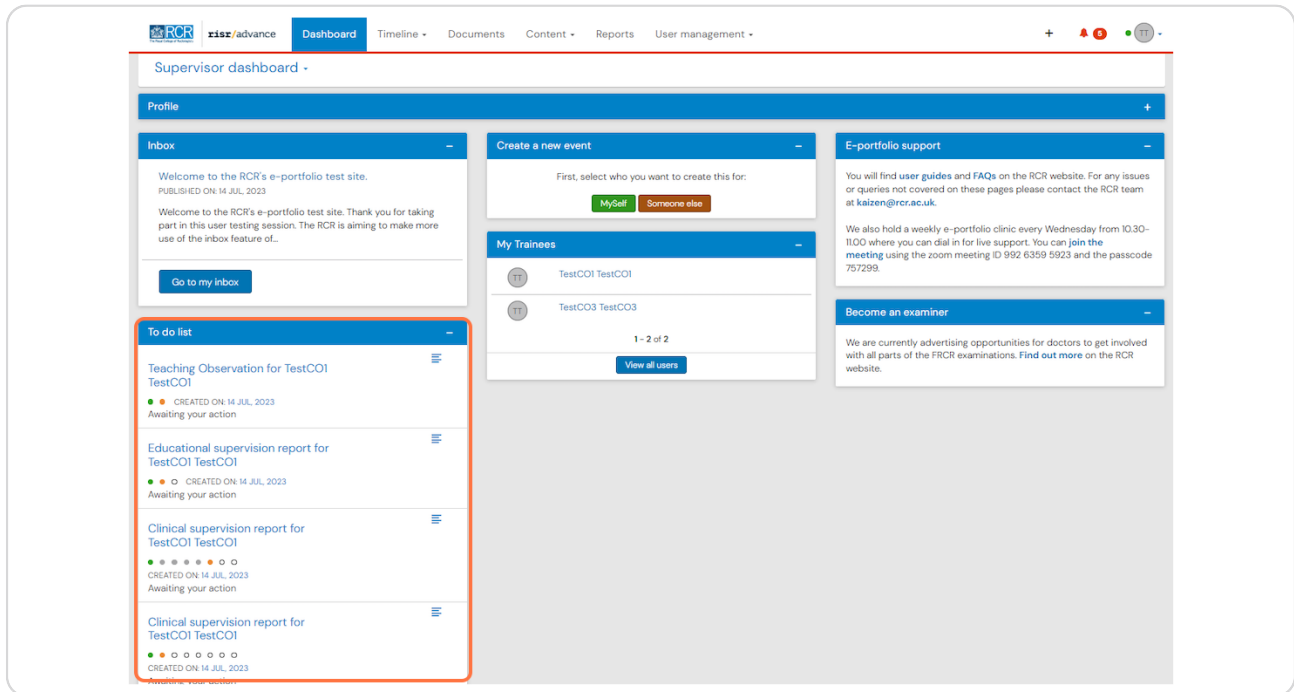


The screenshot shows the RCR Supervisor dashboard with the 'Inbox' widget highlighted by a red box. The 'Inbox' widget contains two messages: 'Welcome to the RCR's e-portfolio test site. PUBLISHED ON: 14 JUL, 2023' and 'Welcome to the RCR's e-portfolio test site. Thank you for taking part in this user testing session. The RCR is aiming to make more use of the inbox feature of...'. Below the messages is a 'Go to my inbox' button. The rest of the dashboard is the same as in the previous screenshot, showing the profile section, 'Create a new event' widget, 'E-portfolio support' widget, and 'My Trainees' section.

STEP 16

You can preview any events awaiting your action in your to do list

Clicking the event will take you to the full view where you can complete the required actions. Clicking on the preview icon to the right of the event will allow you to view the event without navigating away from your dashboard.



The screenshot displays the 'Supervisor dashboard' interface. At the top, there is a navigation bar with the RCR logo, 'risr/advance', and 'Dashboard'. Below this, the dashboard is divided into several sections:

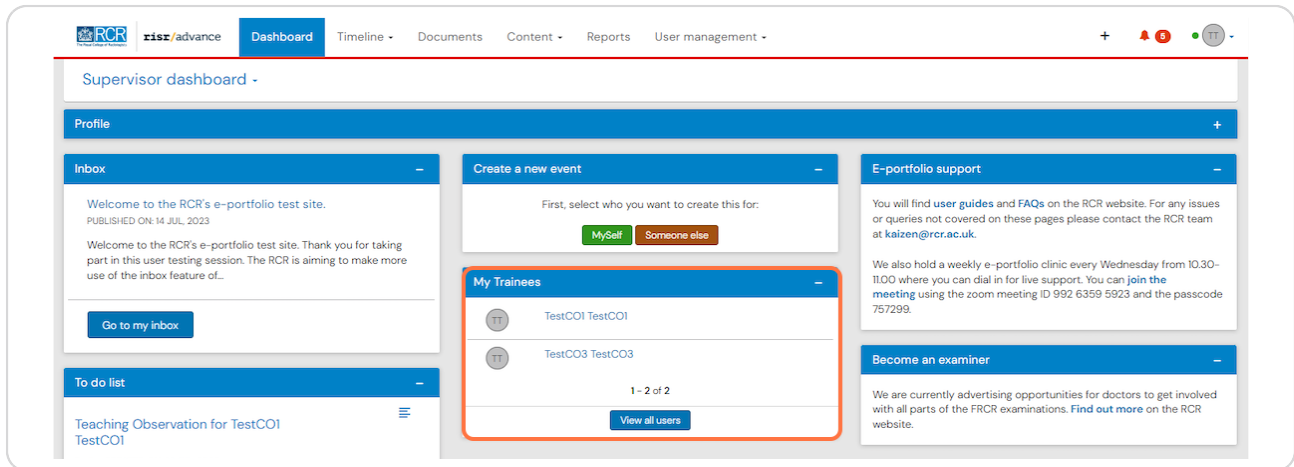
- Inbox:** Contains two welcome messages from the RCR's e-portfolio test site, published on 14 JUL 2023. A 'Go to my inbox' button is present.
- Create a new event:** A section for creating events, with options for 'MySelf' and 'Someone else'.
- My Trainees:** Lists two trainees: 'TestCO1 TestCO1' and 'TestCO3 TestCO3'. A 'View all users' button is at the bottom.
- E-portfolio support:** Provides information about user guides, FAQs, and a weekly e-portfolio clinic.
- Become an examiner:** Advertises opportunities for doctors to get involved with FRCR examinations.
- To do list:** A list of four items, each with a preview icon on the right. The items are:
 - Teaching Observation for TestCO1 TestCO1 (CREATED ON: 14 JUL 2023, Awaiting your action)
 - Educational supervision report for TestCO1 TestCO1 (CREATED ON: 14 JUL 2023, Awaiting your action)
 - Clinical supervision report for TestCO1 TestCO1 (CREATED ON: 14 JUL 2023, Awaiting your action)
 - Clinical supervision report for TestCO1 TestCO1 (CREATED ON: 14 JUL 2023, Awaiting your action)

STEP 17

You can view a list of trainees linked to you

This list is based on your role; if you are viewing the supervisor dashboard you will see a list of trainees that have assigned you as their supervisor, but if you are viewing an ARCP panel member or training programme director dashboard you will see all trainees linked to the same location as you. You may need to switch dashboard views to see the trainees that you require.

Clicking on a trainee will take you to their summary dashboard. You can click on View all users to see a full list of the trainees linked to you.

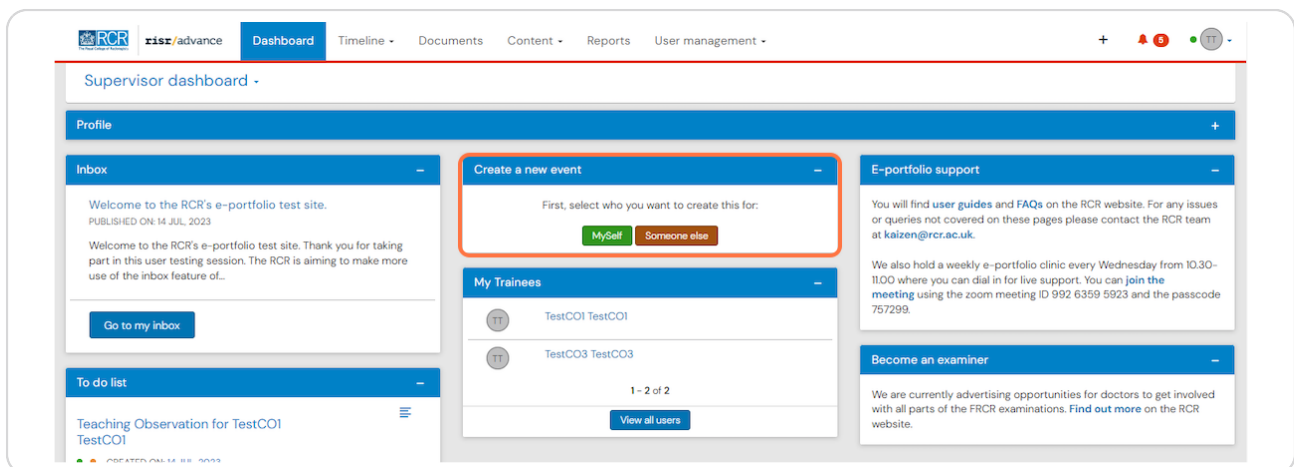


The screenshot shows the RCR Supervisor dashboard. The top navigation bar includes 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area is titled 'Supervisor dashboard' and contains several sections: 'Profile', 'Inbox', 'Create a new event', 'E-portfolio support', 'To do list', and 'My Trainees'. The 'My Trainees' section is highlighted with an orange border and contains a list of two trainees: 'TestCO1 TestCO1' and 'TestCO3 TestCO3'. Below the list is a 'View all users' button. The 'Create a new event' section is also visible, with options for 'MySelf' and 'Someone else'.

STEP 18

You can create a new event for yourself or a trainee

Clicking on Someone else will bring up a search box to identify the trainee who you would like to create an event for



This screenshot is identical to the one in Step 17, showing the RCR Supervisor dashboard. The 'Create a new event' section is highlighted with an orange border. It contains the text 'First, select who you want to create this for:' and two buttons: 'MySelf' and 'Someone else'. The 'My Trainees' section is also visible below it, showing the same list of trainees as in Step 17.

STEP 19

Under each trainee's name you will find shortcuts for common tasks

The screenshot shows the 'Users' management interface. At the top, there's a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area is titled 'Users' and has a search bar. Below the search bar, it says 'Found 2 items'. The list of users is as follows:

Name	Email	Role	Status
TestCO1 TestCO1	TestCO1@rcr.ac.uk	Clinical oncology	ACTIVE
TestCO3 TestCO3	TestCO3@rcr.ac.uk	Clinical oncology	ACTIVE

Each user entry has a row of icons: Summary, Timeline, Goals, and Documents. To the right of each entry are '+ Create new' and 'Disable' buttons. The right sidebar has 'Bookmarked searches', 'Advanced search', and several filter fields: 'Show only users with these roles', 'User email', 'State', 'Clinical radiology training grade', and 'Training Pattern'.

STEP 20

Options for accessing support with your e-portfolio are shown on your dashboard

There are links to user guides and our weekly drop in e-portfolio clinics.

The screenshot shows the 'Supervisor dashboard'. At the top, there's a navigation bar with 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area is titled 'Supervisor dashboard -'. The dashboard is divided into several sections:

- Profile**: A blue header with a '+' icon.
- Inbox**: A section with a blue header and a message: 'Welcome to the RCR's e-portfolio test site. PUBLISHED ON: 14 JUL, 2023. Welcome to the RCR's e-portfolio test site. Thank you for taking part in this user testing session. The RCR is aiming to make more use of the inbox feature of...'. There is a 'Go to my inbox' button.
- To do list**: A section with a blue header and a message: 'Teaching Observation for TestCO1 TestCO1'. There is a 'CREATED ON: 14 JUL, 2023' timestamp.
- Create a new event**: A section with a blue header and a message: 'First, select who you want to create this for:'. There are 'MySelf' and 'Someone else' buttons.
- My Trainees**: A section with a blue header and a list of trainees: 'TestCO1 TestCO1' and 'TestCO3 TestCO3'. There is a 'View all users' button.
- E-portfolio support**: A section with a blue header and a message: 'You will find [user guides](#) and [FAQs](#) on the RCR website. For any issues or queries not covered on these pages 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 [join the meeting](#) using the zoom meeting ID 992 6359 5923 and the passcode 757299.'
- Become an examiner**: A section with a blue header and a message: 'We are currently advertising opportunities for doctors to get involved with all parts of the FRCR examinations. [Find out more](#) on the RCR website.'

STEP 21

The dashboard will also show information about useful resources and upcoming opportunities

The screenshot shows the RCR Supervisor dashboard. At the top, there is a navigation bar with the RCR logo, 'risz/advance', and a 'Dashboard' menu. Below this, the dashboard is divided into several sections: 'Profile', 'Inbox', 'Create a new event', 'My Trainees', 'E-portfolio support', and 'Become an examiner'. The 'My Trainees' section is highlighted with a red box, showing a list of trainees: 'TestCO1 TestCO1' and 'TestCO3 TestCO3'. The 'Become an examiner' section is also highlighted with a red box, containing information about opportunities for doctors to get involved with all parts of the FRCR examinations.

Your trainee list

3 Steps

STEP 22

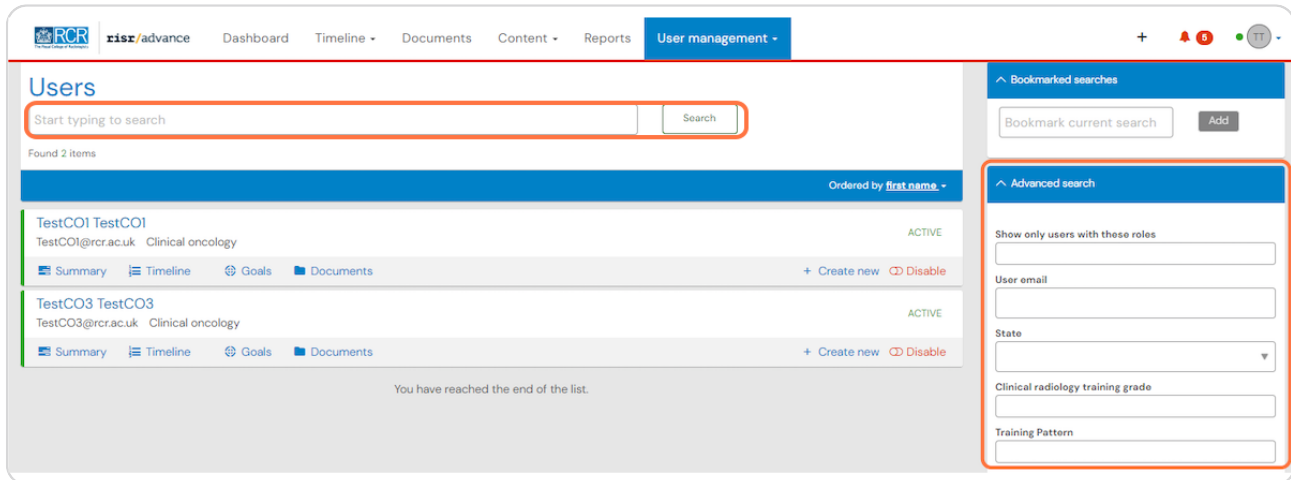
Clicking on a trainee on your dashboard will take you to their summary dashboard

You can click on View all users to see a full list of the trainees linked to you

This screenshot is identical to the one in Step 21, but with a red box highlighting the 'My Trainees' section. This section contains a list of trainees: 'TestCO1 TestCO1' and 'TestCO3 TestCO3'. Below the list, there is a 'View all users' button, which is also highlighted with a red box.

STEP 23

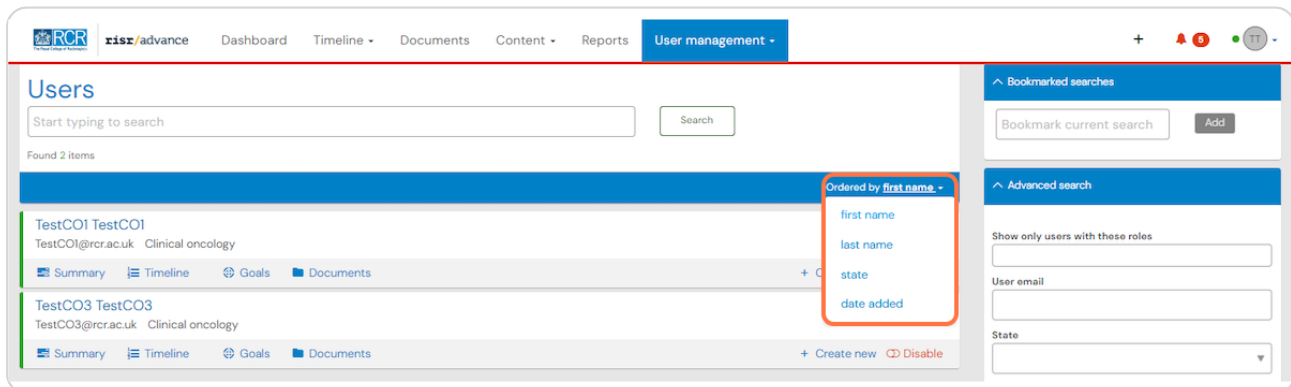
You can use the search box at the top of the page or the advanced search on the right of the screen to find a trainee



The screenshot shows the 'Users' management page in the RCR system. At the top, there is a navigation bar with 'User management' selected. Below the navigation bar, the page title 'Users' is displayed. A search box is located at the top left, with the placeholder text 'Start typing to search' and a 'Search' button. Below the search box, it indicates 'Found 2 items'. The main content area displays a list of users, ordered by first name. The first user is 'TestCO1 TestCO1' with email 'TestCO1@rcrc.ac.uk' and role 'Clinical oncology'. The second user is 'TestCO3 TestCO3' with email 'TestCO3@rcrc.ac.uk' and role 'Clinical oncology'. Both users are marked as 'ACTIVE'. The list includes links for 'Summary', 'Timeline', 'Goals', and 'Documents', along with '+ Create new' and 'Disable' buttons. On the right side, there is a sidebar with 'Bookmarked searches' and 'Advanced search' sections. The 'Advanced search' section is highlighted with a red box and contains several search criteria: 'Show only users with these roles', 'User email', 'State', 'Clinical radiology training grade', and 'Training Pattern'.

STEP 24

You can change to order that trainees appear on the list using the filters at the top of the list

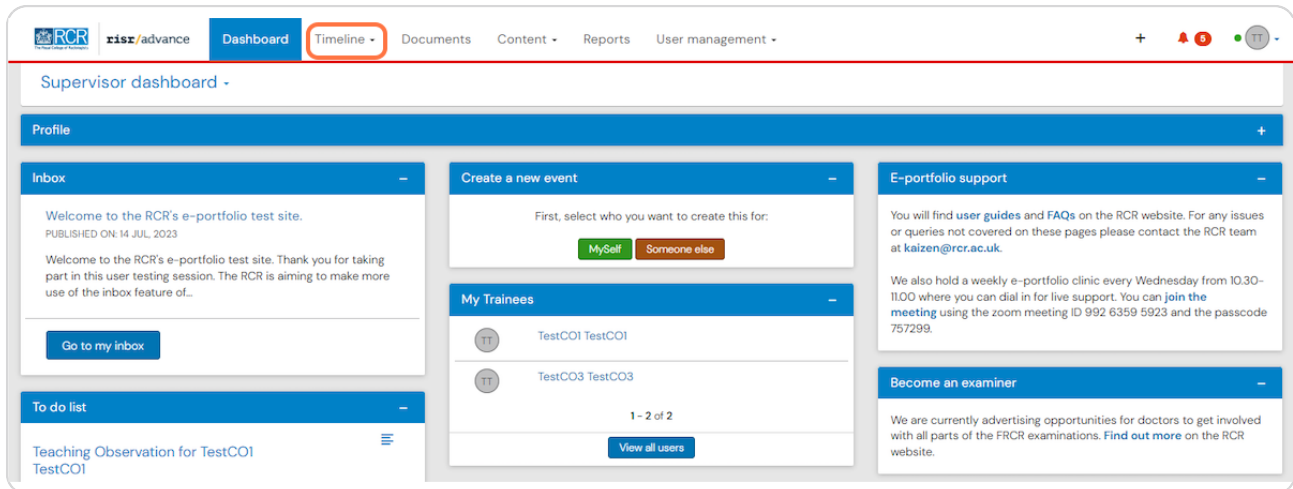


The screenshot shows the 'Users' management page, similar to the previous one. The search box and 'Advanced search' sidebar are visible. The main content area displays the list of users. A dropdown menu is open at the top of the list, showing the current order 'Ordered by first name' and four other options: 'last name', 'state', and 'date added'. The dropdown menu is highlighted with a red box.

STEP 25

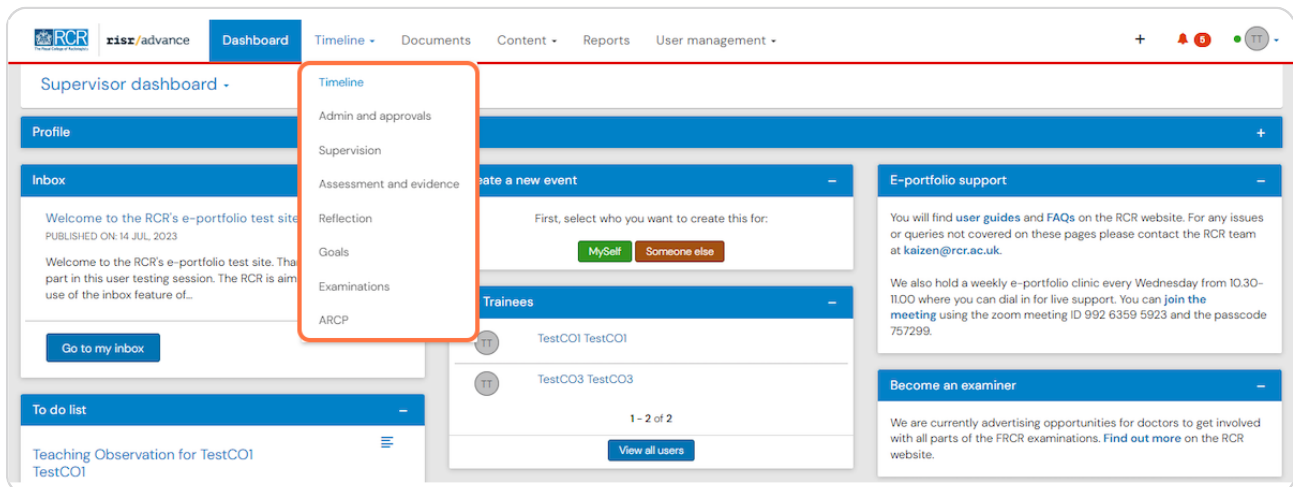
You can access your timeline from the task bar

Your timeline will show you all of the events that you created or responded to



STEP 26

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



STEP 27

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

The screenshot shows the RCR Timeline interface. At the top, there is a navigation bar with 'risz/advance', 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The 'Timeline' tab is active. Below the navigation bar, there is a search box with the placeholder text 'Start typing to search' and a 'Search' button. To the right of the search box, there is a 'Create new' button and a 'Bulk tagging' link. Below the search box, there is a dropdown menu labeled 'Ordered by date created'. The main content area displays a list of events created in July 2023. The events are: 'CO Educational Supervisor's Structured Report for TestCO1 TestCO1' (CREATED ON: 17 JUL 2023), 'Teaching Observation for TestCO1 TestCO1' (CREATED ON: 14 JUL 2023), 'Educational supervision report for TestCO1 TestCO1' (CREATED ON: 14 JUL 2023), and 'Clinical supervision report for TestCO1 TestCO1' (CREATED ON: 14 JUL 2023). Each event has a 'Fill in' button, a 'Reject' button, a 'Show audit log' button, and a 'Preview' button. On the right side of the interface, there is a sidebar with 'Bookmarked searches', 'Advanced search', and 'Information' sections.

STEP 28

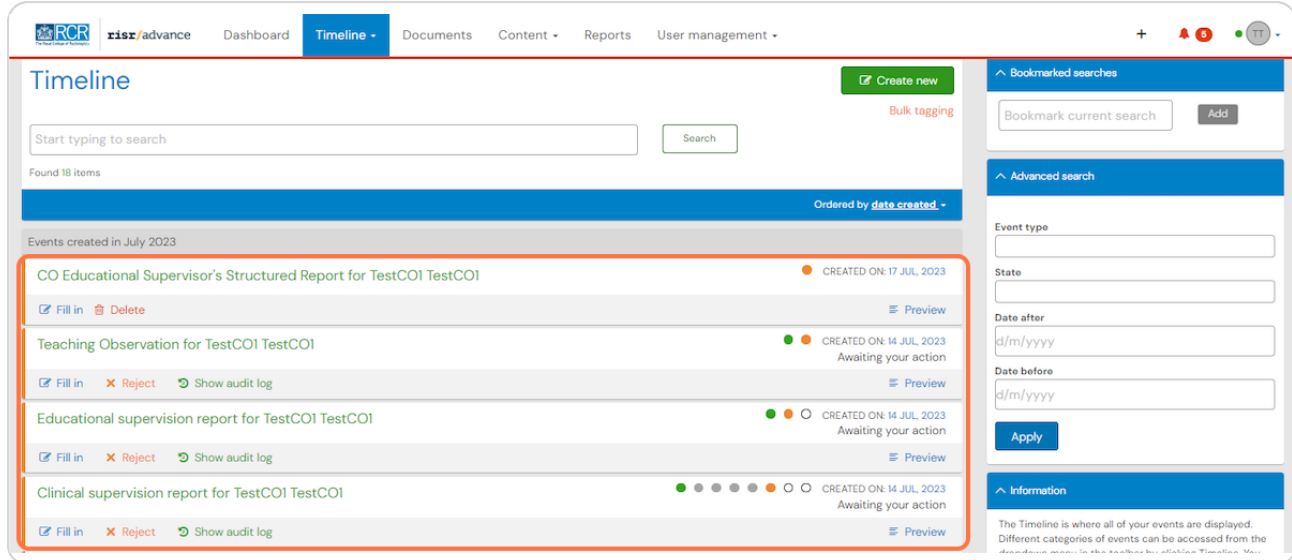
You can search for events using the search box at the top of the page or the advanced search box to the right of your timeline

The screenshot shows the RCR Timeline interface, similar to the previous one. The search box at the top left and the advanced search box on the right are highlighted with orange boxes. The search box contains the placeholder text 'Start typing to search' and a 'Search' button. The advanced search box contains fields for 'Event type', 'State', 'Date after' (with a date format 'd/m/yyyy'), and 'Date before' (with a date format 'd/m/yyyy'), and an 'Apply' button. The main content area and sidebar are the same as in the previous screenshot.

STEP 29

Events that are awaiting you or saved as draft will appear with an orange bar on the left. Completed events appear with a green bar on the left and events that do not require your input appear in grey

Clicking on any event will take you to the detailed view of that event



The screenshot shows the RCR Timeline interface. The top navigation bar includes 'risz/advance', 'Dashboard', 'Timeline', 'Documents', 'Content', 'Reports', and 'User management'. The main content area is titled 'Timeline' and features a search bar, a 'Create new' button, and a 'Bulk tagging' link. Below the search bar, it indicates 'Found 18 items' and 'Ordered by date created'. The events listed are:

- CO Educational Supervisor's Structured Report for TestCO1 TestCO1 (Created on: 17 JUL, 2023)
- Teaching Observation for TestCO1 TestCO1 (Created on: 14 JUL, 2023, Awaiting your action)
- Educational supervision report for TestCO1 TestCO1 (Created on: 14 JUL, 2023, Awaiting your action)
- Clinical supervision report for TestCO1 TestCO1 (Created on: 14 JUL, 2023, Awaiting your action)

Each event entry includes a progress bar with colored dots (green, orange, grey) and a 'Preview' button. The 'Teaching Observation' event is highlighted with an orange bar on the left, indicating it is awaiting action.

STEP 30

You can view the progress of events using the dots next to each event

Each dot represents a stage in the process. Green dots indicate a completed stage, while orange dots show a section that is awaiting a response. You can see who needs to respond to incomplete sections underneath the dots



This close-up screenshot shows the progress indicators for two events:

- Teaching Observation for TestCO1 TestCO1**: The progress bar shows a green dot, an orange dot, and a grey dot. The orange dot is highlighted with a red box, and the text 'CREATED ON: 14 JUL, 2023 Awaiting your action' is displayed next to it.
- Educational supervision report for TestCO1 TestCO1**: The progress bar shows a green dot, an orange dot, and a grey dot. The text 'CREATED ON: 14 JUL, 2023 Awaiting your action' is displayed next to it.

STEP 31

Clicking on Fill in will allow you to complete your section of an event

You can also click on reject to send the event back to its owner. You will be asked to provide an explanation, which can be a useful way of letting trainees know about anything else they need to do before you can complete your section.



The screenshot displays a list of two events in a timeline. The first event is titled "Teaching Observation for TestCO1 TestCO1" and was created on 14 JUL, 2023. It is currently "Awaiting your action". Below the title, there are three buttons: "Fill in" (highlighted with a red box), "Reject", and "Show audit log". To the right of these buttons is a "Preview" button. The second event is titled "Educational supervision report for TestCO1 TestCO1" and was also created on 14 JUL, 2023, with the same "Awaiting your action" status. It also features "Fill in", "Reject", "Show audit log", and "Preview" buttons.

STEP 32

Clicking on preview allows you to view the event in a new window and to complete or reject the event without navigating away from your timeline



This screenshot is similar to the one in Step 31, showing the same two event cards. However, in this instance, the "Preview" button on the first event card is highlighted with a red box, demonstrating the action described in the text.

