



RDF Planner getting started guide

To provide feedback on this user guide or to make suggestions for improvements, please email rdplannerhelpdesk@vitae.ac.uk with 'Getting started guide' in the subject line.

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1 Registering with the RDF Planner (organisation subscription user)

Information

There are a number of prerequisites to your being able to use the RDF Planner under an organisation subscription:

- your organisation subscription administrator will need to have created a user account for you in your organisation subscription on the RDF Planner and have sent you an invitation email to register on the RDF Planner
- you will need to have access to the invitation email that your organisation subscription administrator sent you

Clicking on the link in the invitation email is the only way of starting the process to register on the RDF Planner. Registration is a one-off process. Step by step instructions for registration are provided in Section 1 of this getting started guide.

When registering you will make a choice between using a standard username and password login option or using a third party service to prove your identity when logging on. Section 2 describes how to use your standard logon or third party identity service to login to the RDF Planner. You can switch which login method or identity service you use at any time by following the steps described in Section 4 of this document.

Once you have successfully registered on the RDF Planner, you can logon to the application by visiting <http://www.rdfplanner.net> and selecting the button for your preferred login method.



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- 1 Your organisation administrator will send you an email inviting you to use the RDF Planner. The email will come from 'noreply@rdfplanner.net' with the subject 'Vitae RDF Planner invitation'.



Researcher Development Framework Planner

Dear Example,

Welcome to the Vitae Researcher Development Framework (RDF) Planner.

The RDF Planner complements organisations' professional development provision for researchers, based on the Vitae RDF. An organisational subscription will enable organisations to:

- combine the benefits of the Vitae RDF with existing organisational resources
- support professional development planning for all your researchers based on benchmarks set by your university
- create a personal record of progress, backed up by evidence
- demonstrate your university's commitment to training and developing world-class researchers

The user friendly RDF Planner provides researchers with:

- a structure with which to recognise, reflect and evidence expertise, capabilities and achievements alongside career goals
- access to organisational and Vitae resources to support well rounded professional development
- structured and more objective information to discuss with managers and supervisors.

This invitation email has been sent to you by your RDF Planner organisation administrator. Please follow this link when you are ready to complete the RDF Planner user set up process:

<http://www.rdfplanner.net/example-university/invite/88787055-54f6-4831-bb11-a0ca00e0beae>

Once you have registered for the RDF Planner, please log in at www.rdfplanner.net

For technical or RDF support within your organisation, contact:

joe.bloggs@university.ac.uk
a.example@example-university.ac.uk

For further technical help, contact Vitae at rdplannerhelpdesk@vitae.ac.uk.



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- 2 Select the invitation link in the email. You will be taken to a login page.

Information

You can create a password to use with your email address **or** you can choose to use an account with a third party service (e.g. Google, Facebook) that can be used to prove your identity when logging on to the application.

If you use one of the supported identity providers, no information from the RDF Planner is shared with or is accessible to this third party service. The RDF Planner will direct you to the identity provider's login screen so you can login using the credentials of the account you have with the identity provider. The RDF Planner does not access other information stored on the identity provider service. Your chosen identity provider service cannot access any information that you created on the RDF Planner application. Even so, you should carefully review any privacy options presented to you when logging on through an identity provider.

Currently supported identity providers are.

- Windows Live (Hotmail, SkyDrive, LIVE)
- Google (Gmail, Google+, YouTube, Google Docs)
- Yahoo! (Yahoo! Mail, BTInternet, flickr)
- Facebook (Facebook)

If you are a registered user of one of these services, you will already have a valid account that you could use to logon to the RDF Planner. If you are not, you could create a password

specifically for the RDF Planner or you could create an account with one of the supported identity providers and then select to use that provider.

- 3 If you want to create a password to use with your email address as the username for RDF Planner, enter a password in the 'Password' and 'Password confirmation' fields and click on 'Save'. We recommend that you use a complex password and that you do not use the same password that you use to access you organisation services. Go to step 6.
- 4 Otherwise, select an identity provider. You will be directed to the identity provider login page. Enter your provider credentials. The example here is from Yahoo!



Hi, Example ▾ | Sign Out | Help

YAHOO!

rfdpdp.accesscontrol.windows.net

Sign in to rfdpdp.accesscontrol.windows.net with your Yahoo! ID

Please verify your password

 **Are you protected?**
Create your sign-in seal.
(Why?)

Yahoo! ID
example.user2

Password:

[I can't access my account](#)

Not example.user2?
[Sign in as a different user.](#)

Copyright © 2012 Yahoo! Inc. All rights reserved.
[Copyright/IP Policy](#) | [Terms of Service](#) | [Guide to Online Security](#) | [Privacy Policy](#)

- Carefully review and select any privacy options presented by your identity provider and agree to proceed. Go to step 6.




Hi, Example ▾ | Sign Out | Help

YAHOO!
UK & IRELAND

Click "Agree" to sign in to [rdfpdp.accesscontrol.windows.net](#) using your Yahoo! ID and to allow the sharing of Yahoo! info.

You are sharing the following:

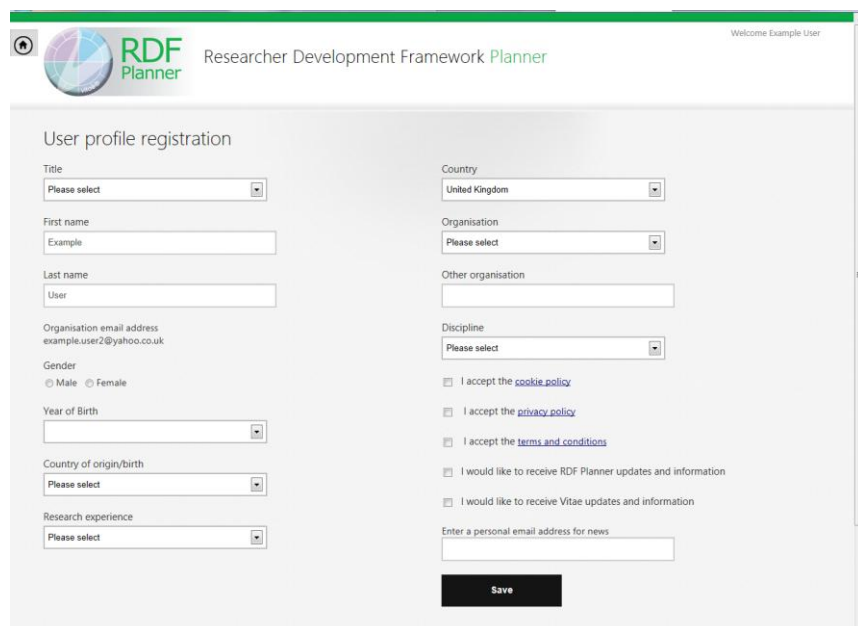
 **Example User**
example.user2@yahoo.co.uk

Agree

By clicking Agree you are agreeing to the [Yahoo! Additional Terms of Service](#) and Yahoo!'s sharing of the types of account info listed above on return visits.

Copyright © 2012 Yahoo! All rights reserved.
[Copyright/IP Policy](#) | [Terms of Service](#) | [Guide to Online Security](#) | [Privacy Policy \(Updated\)](#)

- When you have logged in you will be taken to a registration page. Complete the RDF planner profile information. You will need to accept the 'Cookie Policy', 'Privacy Policy' and 'Terms and Conditions' in order to proceed. Opt in if you want to receive RDF Planner and Vitae updates and newsletters by email. You can provide a different email address for these mailings if desired.



Welcome Example User

RDF Planner Researcher Development Framework Planner

User profile registration

Title:

Country:

First name:

Organisation:

Last name:

Other organisation:

Organisation email address:

Discipline:

Gender: Male Female

Year of Birth:

Country of origin/birth:

Research experience:

I accept the [cookie policy](#)

I accept the [privacy policy](#)

I accept the [terms and conditions](#)

I would like to receive RDF Planner updates and information

I would like to receive Vitae updates and information

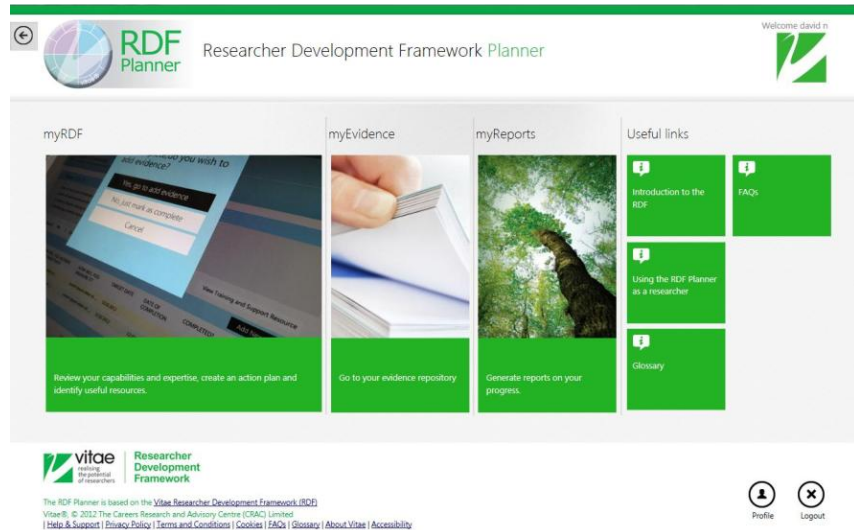
Enter a personal email address for news:

Save



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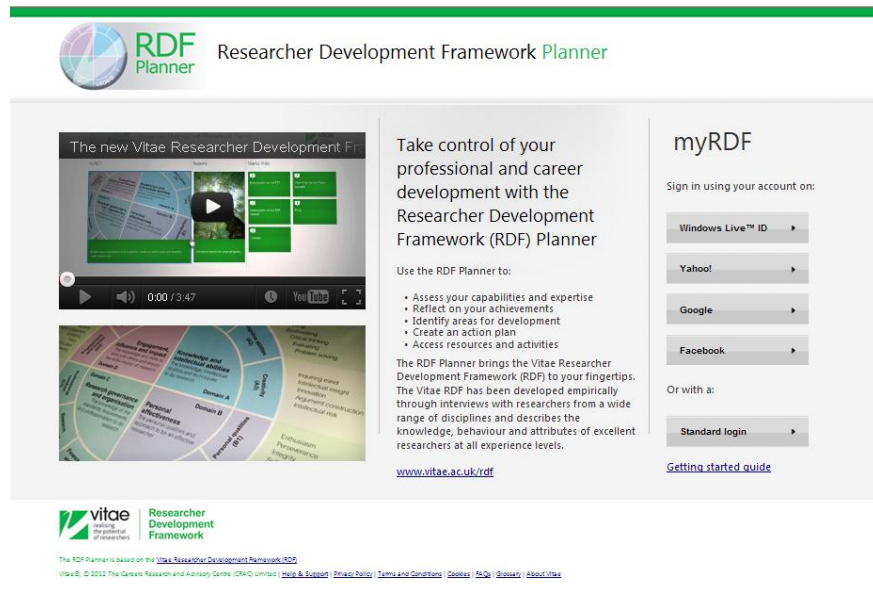
- 7 Save your profile information. You will be logged onto the application and will be taken to the RDF Planner home page.



2 Logging on to the RDF Planner

The following steps assume that you have already registered with the RDF Planner (See Section 1 of this user guide).

You can find the application at www.rdfplanner.net/



Researcher Development Framework

The RDF Planner is based on the [Vitae Researcher Development Framework \(RDF\)](http://www.vitae.ac.uk/rdf). Vitae®, © 2012 The Careers Research and Advisory Centre (CRAC) Limited. All rights reserved. For conditions of use please refer to RDF Planner Terms and Conditions



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- 1 If you opted to use the standard login method and provided a password to use when registering, go to Step 2. If you opted to use one of the supported identity providers, go to Step 4.
- 2 Click the 'Standard login' button. Enter your username and password. Your username will be the email address that your invitation email was sent to. If you have forgotten your password, go to Section 3 of this getting started guide.
- 3 Click on the 'Sign in' button. You will be logged on to the RDF Planner user home page. Go to Step 6.
- 4 Select the button for the identity provider you chose when you first registered to use the application (see Section 1 above). The example here uses Google.

A screenshot of the Google Accounts sign-in page. The page has a white background with the Google logo in the top left and a 'SIGN UP' button in the top right. Below the logo, the word 'Accounts' is written in red. A message states: 'Rdfpdp.accesscontrol.windows.net is asking for some information from your Google Account. To see and approve the request, sign in. [Learn more](#)'. On the right, there is a sign-in form with fields for 'Email' and 'Password', a 'Sign in' button, a 'Stay signed in' checkbox, and a link for 'Can't access your account?'.

- 5 Sign in to your identity provider and give permission for the RDF Planner application to access your identity provider name and email address (required to prove your identity).

A screenshot of the Google Accounts permission page. The browser address bar shows 'https://accounts.google.com/...'. The page title is 'Google accounts' and there is a link for 'Sign in as a different user'. The main content area shows a message: 'Rdfpdp.accesscontrol.windows.net is asking for some information from your Google Account example.rdfplanneruser@gmail.com'. Below this, it lists the email address: 'Email address: Example User (example.rdfplanneruser@gmail.com)'. There are two buttons: 'Allow' and 'No thanks'. At the bottom, there is a checkbox labeled 'Remember this approval' which is checked.



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6 You are logged on and will land at the RDF Planner homepage.

3 Changing your password

If you chose to use a third party identity provider when you registered to use the RDF Planner (see Section 1), then you will have to use the identity provider's password reset/recovery system to change your password. If you chose to use the standard login option, go to Step 1. If you cannot remember which login method or which provider you originally chose, go to Section 5 (Changing login method).

- 1 Logon to the RDF Planner. If you are using the standard logon method and cannot remember your password, go to Section 4 (Resetting your password).
- 2 Open your 'Profile' page by clicking on the 'Profile' button in the RDF Planner footer.
- 3 Click the 'Change password' link at the top of the profile page.
- 4 Enter your new password in the 'Password' and 'Confirm password' fields.
- 5 Click on the 'Save' button. Your password has now been changed.

4 Resetting your password

If you chose to use a third party identity provider when you registered to use the RDF Planner (see Section 1), then you will have to use the identity provider's password reset/recovery system to manage your password. If you chose to use the standard login option, go to Step 1. If you cannot remember which login method or which provider you originally chose, go to Section 5 (Resetting login method).

- 1 Click on the 'Standard login' button and then click on the 'Forgot your password?' link.
- 2 Enter your email address in the 'Username' field. This is the email address that your subscription administrator sent your original invitation to register email to.
- 3 Enter the word/s that appear in the picture in the 'Type text below' field. This is a security feature.
- 4 Click on the 'Submit' button. An email is sent containing a password reset link. The email is sent from 'noreply@rdfplanner.net'. If you get an error message because the word/s you entered were not recognised, you will see new word/s to enter. Enter the new words and resubmit. Repeat until successful.

- 5 Click on the link in the password reset email and enter your new password in the 'Password' and 'Password confirmation fields' on the password reset page.
- 6 Click on the 'Save' button. You are logged in to the RDF Planner on your 'Profile' page. Click on the home icon to reach the user home page.

5 Changing login method

If you are successfully logged onto the RDF Planner, you can switch your login method or provider by going to your profile area. You can access your profile area by clicking on the 'Profile' icon in the application footer.

- 1 Click on the 'Change login method' link at top of profile page.
- 2 The current login method is shown. Select an alternative login method or provider.

Information

If you select a third party service and are not currently logged into the third party service on your computer, you are taken to the login page for that service. If you then enter valid credentials for that service, the change in method/provider is made and you are taken back to your profile page. If you are logged into the third party service on your computer when you select to use the service, the change in method/provider is made and you are taken directly to your profile page.

If you select to move to the standard login method, you are prompted for a password. Once a password has been entered in the 'Password' and 'Confirm password' fields and the change password form has been submitted, the change in login method is made and you are taken to your profile page.

6 Resetting login method

If you are not logged into the RDF Planner and cannot remember which login method or third party identity service you are using, you can follow these steps to reset your login method/service.

- 1 Click on the 'Standard login' button and then click on the 'Forgot your password?' link.
- 2 Enter your email address in the 'Username' field. This is the email address that your subscription administrator sent your original invitation to register email to.
- 3 Enter the word/s that appear in the picture in the 'Type text below' field. This is to prevent automated password cracking attacks.



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- 4 Click on the 'Submit' button. An email is sent containing a password reset link. The email is sent from 'noreply@rdfplanner.net'. If you get an error message because the word/s you entered were not recognised, you will see new word/s to enter. Enter the new words and resubmit. Repeat until successful.
- 5 Click on the link in the password reset email and choose the logon service that you would like to logon with from the list on the 'Password reset' page. If you want to use standard logon (combination of your email address and password), enter a password in the 'Password' and 'Confirm password' fields.

7 Requesting transfer of subscription

If you are moving to a different organisation, you can request to transfer your subscription. All requests are considered and responded to, however, you can only successfully transfer if the organisation you are requesting to move to has a valid subscription and your transfer request is accepted by the organisation administrator.

- 1 Open your 'Profile' page by clicking on the 'Profile' button in the RDF Planner footer.
- 2 Click the 'mySubscription' link at the top of the profile page.
- 3 Complete and submit the 'Request transfer' form. Please provide as much relevant information as possible to support your request.

If your request is approved by the target organisation administrator, your subscription will be automatically transferred to the new organisation. You will be sent a notification email informing you if your request has been approved or denied.

8 Getting help

There are a number of sources for getting more information about the Vitae Researcher Development Framework (RDF) and to obtain further help in using the RDF Planner online tool.

8.1 RDF help

- Information about the RDF can be found by clicking the 'Introduction to the RDF' tile/box in the 'Useful links' section of the home page
- Further information about the RDF can be found on the Vitae website at www.vitae.ac.uk/rdf
- Links to a glossary of RDF terms and terms related to the section of personal development can be found in the RDF Planner footer and in the 'Useful links' section of the home page



8.2 RDF Planner help

- Once you are registered and logged on to the RDF Planner home page, the 'Useful links' section includes links to help documents and web pages provided by Vitae and your organisation
- You can view training and support resources for RDF descriptor phases by selecting the black button labelled 'Access training and support in this section' when you are looking at the phase detail section of the RDF tree
- If you are having problems getting started or logging on to the system, you can get help from your organisation administrator. Your organisation administrator's email address will be included in the email you were sent inviting you to logon to the RDF Planner
- If you cannot find the answers you need in the above resources, you can email the RDF Planner support team at rdfplannerhelpdesk@vitae.ac.uk