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**SmartScreen**

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# **SmartScreen (powered by Canvas)**

## **User Guide for Tutors**

Version 1.0

Last modified 9-April-2024

For external use





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## Document revision history

| Version | Changed by    | Summary of change | Approval date |
|---------|---------------|-------------------|---------------|
| 1.0     | City & Guilds | Document created  | 25.03.2024    |



# 1. Introduction

This user guide is for customers who have purchased a SmartScreen package. It is aimed at tutors who will be responsible for managing licences and subscription products and delivering SmartScreen content to learners.

**SmartScreen** (powered by Canvas) is the City & Guilds tutor, assessor and learner support website that provides specific support materials for City & Guilds' qualifications.

A list of the qualifications/products that are available on SmartScreen can be found [here](#).

**Canvas** is the web-based learning management platform, (owned by Instructure Inc.), used by City & Guilds to host our tutor and learner support materials.

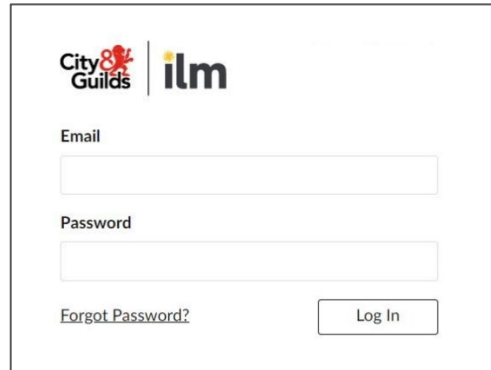
## SmartScreen (powered by Canvas) system requirements:

| Desktop Browsers  | Mobile Browsers   |
|---|---|
| <ul style="list-style-type: none"><li>• Chrome 107 and 108 (preferred)</li><li>• Firefox 106 and 107</li><li>• Edge 106 and 107</li><li>• Respondus Lockdown Browser</li><li>• Safari 15 and 16</li></ul> | The latest version of Safari (iOS) and Chrome (Android) |

## 2. Login and set up your SmartScreen profile

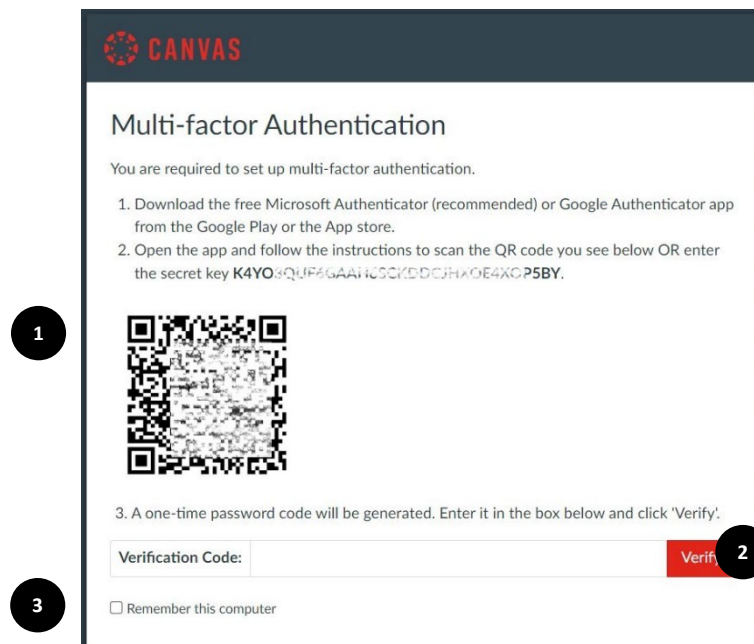
### Account login:

1. Access SmartScreen via this [link](#).
2. Enter your email address and password. If you have forgotten your password, please use the '**Forgot Password?**' link.



The image shows a login form for SmartScreen. At the top left, there are logos for 'City Guilds' and 'ilm'. Below the logos, there are two input fields: 'Email' and 'Password'. Below the 'Password' field, there is a link for 'Forgot Password?' and a 'Log In' button.

3. You will be asked to set up Multi-factor Authentication to confirm your identity. You will need to have a mobile phone on hand with **Microsoft Authenticator** (recommended) or **Google Authenticator**. These apps can be downloaded and installed via [App Store](#) or [Play Store](#).

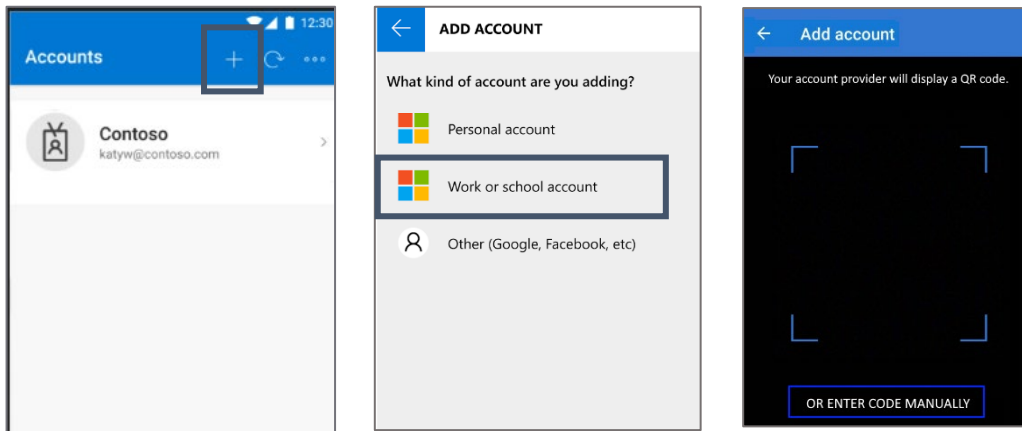


The image shows a 'Multi-factor Authentication' setup screen from Canvas. The screen has a dark header with the 'CANVAS' logo. Below the header, the title 'Multi-factor Authentication' is displayed. The main content area contains the following text: 'You are required to set up multi-factor authentication.' followed by two numbered instructions: '1. Download the free Microsoft Authenticator (recommended) or Google Authenticator app from the Google Play or the App store.' and '2. Open the app and follow the instructions to scan the QR code you see below OR enter the secret key K4YO:3QUP6GAAIUSCKDDCJHXGE4XCP5BY.'. Below the instructions, there is a QR code. Below the QR code, there is a third instruction: '3. A one-time password code will be generated. Enter it in the box below and click 'Verify''. Below this instruction, there is a 'Verification Code:' input field and a red 'Verify' button. At the bottom of the screen, there is a checkbox labeled 'Remember this computer'. Three numbered callouts (1, 2, 3) are placed around the screen: callout 1 is next to the QR code, callout 2 is next to the 'Verify' button, and callout 3 is next to the 'Remember this computer' checkbox.

1

Open the authenticator app, set up a new entry for Canvas, scan a QR code or enter the secret key if you are accessing Canvas via smartphone or tablet.

## How to set-up Microsoft Authenticator app:



- Click on '+' button.
- Click on the '**Other (Google, Facebook, etc.)**' button.
- The App will launch a QR code scanner or you will be able to enter secret key manually.

2

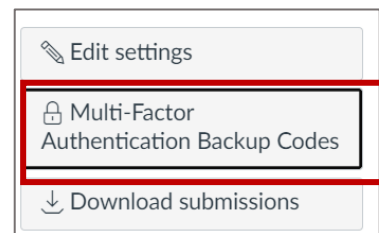
Enter code generated by the app and click '**Verify**'.

3

If you want multi-factor authentication to remember the computer you are using to log in to SmartScreen, click the '**Remember this computer**' checkbox.

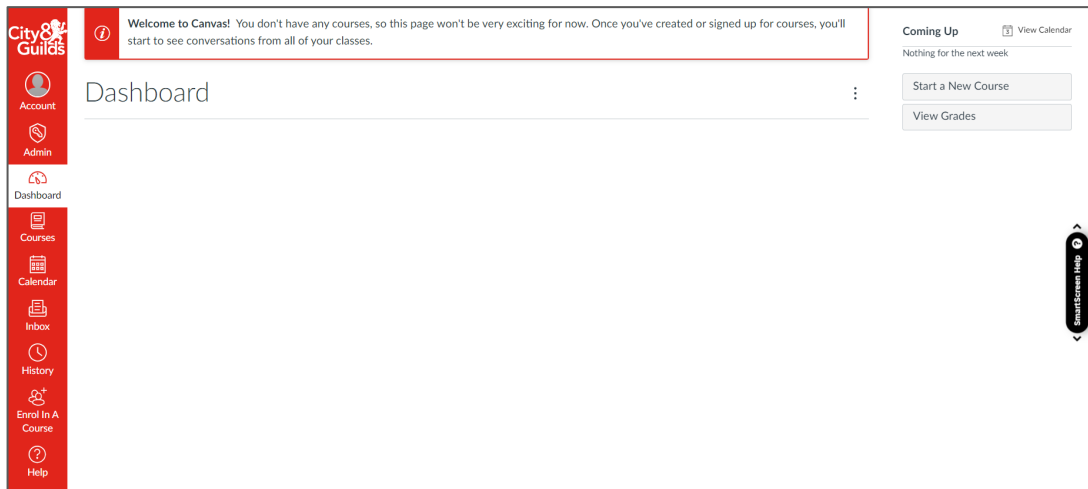
Canvas allows you to generate backup codes that can be used when you have no access to a mobile phone. To generate codes:

- Access your '**Account**' > '**Settings**' menu.
- Click on '**Multi-Factor Authentication Backup Codes**'.
- 10 backup codes will be generated.

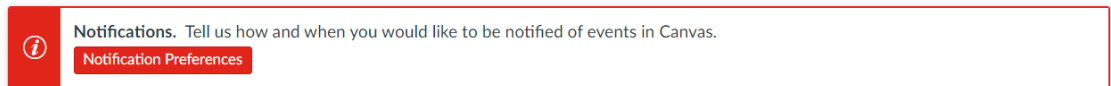


4. After login you will be redirected to the '**Dashboard**' page. If you were assigned as a tutor to any of the packages, you will see them there. For information on how to find and manage your packages, please refer to [Section 6](#) of this guide.



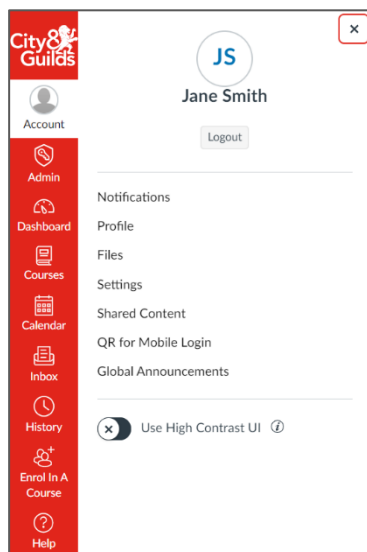


5. You can update your notifications preferences by clicking the **'Notification Preferences'** button on the banner on the **'Dashboard'** or via the **'Account'** menu.



### Set up your account:

To modify your account settings, access the **'Account'** menu via the main navigation menu.



- **Notifications** – update notifications preferences for SmartScreen
- **Profile** – upload your picture or update your name
- **Files** – function to upload with store and view your personal files
- **Settings** – update your time zone, add an additional email address or change accessibility settings
- **Global Announcements** – view announcements from City & Guilds.

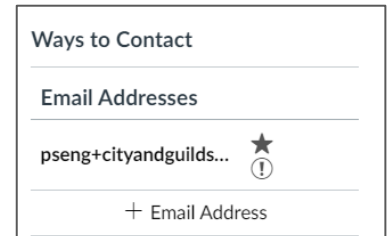
### How to add an additional email address:

You can add additional email addresses to your account to ensure you receive SmartScreen notifications if you are unable to access them via your main email.

**Important note:** you will not be able to use the additional email address to login into SmartScreen.

To add an additional email:

1. Click on **'Account'** in the main menu.
2. Click on **'Settings'**.
3. In the section **'Ways to Contact'** click **'+ Email Address'**.
4. In the pop-up window add a new email address and click **'Register Email'**.
5. A confirmation email will be sent to the added address.
6. Click on the link in the email to finish your email registration.



### Important notes about email addresses:

You must use one email address per role. If you wish to be both a Tutor and, **also**, a Centre Administrator (or Learner), you will need to create yourself as a new user in the Enrolment Tool using a separate email address for the Centre Administrator (or Learner) role.

You can also only use one email address per SmartScreen account. If your centre has multiple accounts (e.g. for different sites) and you wish to be able to access these, you will need a separate email address for each account. It is not possible to have a single email address across multiple accounts.

### 3. Overview of Admin menu options

This is where you can manage your learners and packages.

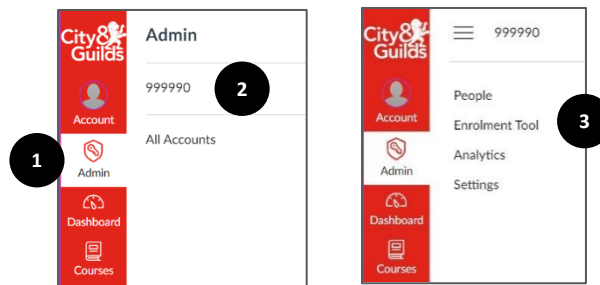
You will have access to the following options in the 'Admin' menu:

1. **People** – list of all users registered to your centre in SmartScreen. You can see users' names, emails, and the date of the last login. Please see [section 5](#) for detailed instructions on how to create new users.
2. **Enrolment Tool** – a tool that will allow you to manage your SmartScreen products. Please see [section 6](#) for detailed instructions.
3. **Analytics** – provides usage statistics. Please see [section 7](#) for detailed instructions.
4. **Settings** – account management options including:
  - a. **Admins** – list of Centre Administrators and Tutors
  - b. **Announcements** – view announcements from City & Guilds
  - c. **Reports** – available admin reports. Please see [section 7](#) for detailed instructions
  - d. **Apps** – list of apps / plug-ins. Currently, external apps cannot be configured for your organisation.

## 4. Overview of the Enrolment Tool

The 'Enrolment Tool' is for tutors to manage (add learners and other tutors to the system and then assign them to products). As a tutor you will have visibility of the products you are assigned to.

### Accessing the Enrolment Tool



1. Click on the 'Admin' menu
2. Click on your **Centre Number** (in the above example that is 999990).
3. Click on the 'Enrolment Tool' to access a version of the screenshot below.

The screenshot shows the Enrolment Tool interface. The '999990 Test centre' is highlighted with a red box. The interface includes a navigation menu on the left with 'Enrolment Tool' selected. The main content area is titled 'Licences and Subscriptions' and contains a table with the following data:

| Product Name   | SS Code     | Product Type | Topic                  | Licences Available | Start Date | End Date   |
|--|-------------|--------------|------------------------|--------------------|------------|------------|
| <input type="checkbox"/> 4692 Digital Learning Hub for ESOL - free starter package | SS0020-4692 | Licence      | ESOL                   | 6/6                | 20/02/2024 | 19/02/2025 |
| <input type="checkbox"/> Ready for Social Care                                     | RFHSC20     | Licence      | Health and Social Care | 3/4                | 20/02/2024 | 19/02/2025 |

# The Purchases Tab

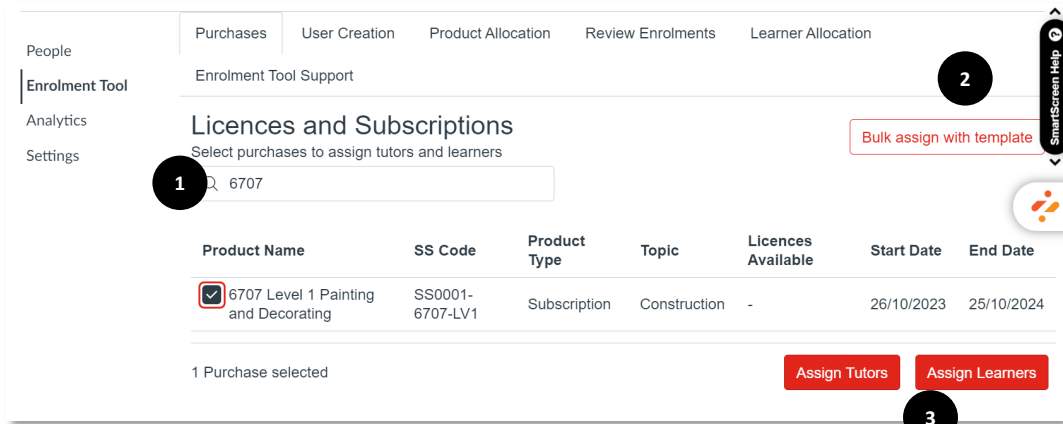
The 'Purchases' tab shows all your SmartScreen resources. You can assign products to your learners and other tutors via this tab.

The screenshot shows the 'Purchases' tab interface. At the top, there are navigation tabs: 'Purchases', 'User Creation', 'Product Allocation', 'Review Enrolments', 'Learner Allocation', and 'Enrolment Tool Support'. Below this is the section 'Licences and Subscriptions' with the subtitle 'Select purchases to assign tutors and learners'. A search bar is present. A red button labeled 'Bulk assign with template' is in the top right. The main content is a table with columns: Product Name, SS Code, Product Type, Topic, Licences Available, Start Date, and End Date. Two rows of data are shown, each with a checkbox in the first column. Numbered callouts 1 through 6 point to the respective columns in the table header.

| 1                        | Product Name  | 2                | SS Code      | 3                        | Product Type | 4          | Topic      | 5 | Licences Available | 6 | Start Date | End Date |
|--------------------------|---|------------------|--------------|--------------------------|--------------|------------|------------|---|--------------------|---|------------|----------|
| <input type="checkbox"/> | 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 81/90        | 22/01/2024 | 21/01/2025 |   |                    |   |            |          |
| <input type="checkbox"/> | 6100 Level 2/3 Professional Cookery: Enhanced                 | SS0129-6100-02   | Subscription | Hospitality and Catering | -            | 22/01/2024 | 21/01/2025 |   |                    |   |            |          |

This tab allows you to view:

- 1 Product Name** – these are the products your centre has purchased.
- 2 SS Code** – the unique product code as specified on the Walled Garden.
- 3 The Product Type** – this indicated if the products is a per-licence or subscription-based product.
- 4 The Topic** – this is usually the industry area (Construction, Hairdressing etc.).
- 5 Licences Available** – e.g. 100/100 would mean there are 100 licences available to allocate.
- 6 Start Date and End Date** – when the product was purchased and is set to expire.



- 1 You can use search to find your required package. You can search by Product Name, Product Type or Topic.
- 2 To bulk assign multiple tutors or learners to products click on ‘Bulk assign with template’.
- 3 Select the user type you wish to enrol to the package by clicking on the ‘Assign Tutor’ or ‘Assign Learner’ button.

**Important note:** please allow a minimum of 60 minutes after you have checked out of the Walled Garden for a product to appear in SmartScreen.

### Bulk assign products

#### Bulk Assign

**Step 1**  
Download the template file to import your data.  
*Please ensure you are happy with any licence allocations before uploading this file. You will not be able to make any changes once confirmed.*

1 [Download template file](#)

**Step 2**  
Upload the template file with your data.

2 [Upload template file](#)

#### Recent imports

| File   | Import time        | Warnings                     |
|--|--------------------|------------------------------|
| <a href="#">bulk_assign_template (8).csv</a> | June 13 2023 22:59 | <a href="#">warnings.csv</a> |
| <a href="#">bulk_assign_template (7).csv</a> | June 12 2023 18:15 | <a href="#">warnings.csv</a> |

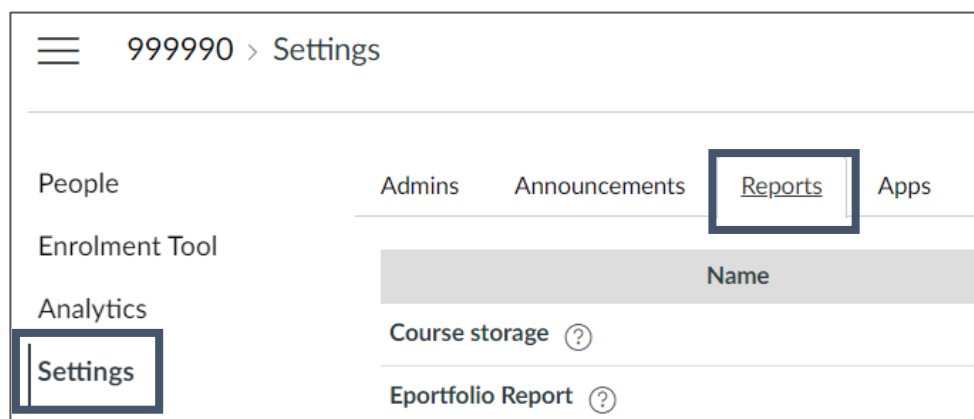
- 1 Download the template CSV file. If you have done uploads before, you can modify previously used files.

Enter the **SmartScreen product codes** and **Canvas user ID** in the file.

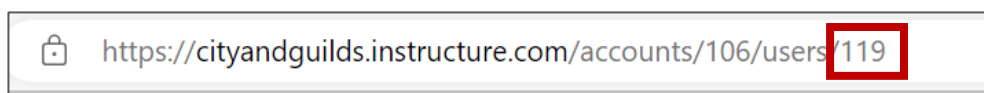
|   | A               | B              |
|---|-----------------|----------------|
| 1 | product_ss_code | canvas_user_id |
| 2 | SS1234          | 1              |
| 3 |                 |                |

There are two ways to find Canvas user ID:

- Go to the **'Settings'** tab in the **'Admin'** menu and click on **'Reports'**. Run **'Provisioning'** report by clicking **'Configure report'** and select **'Users CSV'**.



- Go to the **'People'** tab in the **'Admin'** menu. Find and click on the relevant learner. The Canvas user ID is the number at the end of the URL.



**Important note:** users need to be registered in SmartScreen before a product can be assigned to them.

- 2 Upload the file by clicking the **'Upload template file'** button.

- For licensed products – learners will be enrolled and will see the product appear on their **'Dashboard'**.
- For subscription products – learners will now need to self-register via the **'Enrol In A Course'** button.

3 You will see up to five recent uploads in the **'Recent Imports'** section. To see any warning notifications raised during the upload, click the 'warnings.csv' link. Warnings can include errors like duplicated enrolments, or incorrect or missing products.

After the upload has been processed, the learner will see the package in their **'Dashboard'**. They will need to accept an invitation for full access to the package content.

## The User Creation Tab

This tab is used to create either individual users or organise bulk uploads.

Purchases User Creation Product Allocation Review Enrolments Learner Allocation Enrolment Tool Support

### User Creation

1 Add Individual User Bulk Add Learners 2

Full name

Display name (optional)   
People will see this name in discussions, messages and comments

Sortable name (optional)   
This name appears in sorted lists

Email

Notify user via email   
If unchecked, the login URL and user email will need to be communicated with the new user outside of Canvas, in order for them to create a password and access the system.

Create as a Customer Admin

Create as a Tutor   
If neither Customer Admin or Tutor is checked, the user will be created as a Learner by default.

Add User



## How to create new SmartScreen users:

To create a new user access, select 'Admin' > 'Enrolment Tool' > 'User Creation'.

You have two options:

- 1 Create a single user. It can be a new customer admin, tutor or learner.
- 2 Mass create learners by uploading a CSV file.

## How to create a single user:

1. Click on the tab 'Add individual user'.
2. Enter user's name, last name, and email address.
3. Leave 'Notify user via email' ticked to ensure the new user receives the activation email that will allow them to set their password. **This is important.**
4. Select role for the user. Please remember that you can tick only one of the boxes. If none of the boxes are ticked, the new user will be created with a learner role.
5. Click 'Add User'.

Purchases User Creation Learners Manage tutors Enrolment Tool Support Review enrolments

### User Creation

1 Add Individual User Bulk Add Learners

2 Full name

Display name (optional)   
People will see this name in discussions, messages and comments

3 Sortable name (optional)   
This name appears in sorted lists

Email

4 Notify user via email   
If unchecked, the login URL and user email will need to be communicated with the new user outside of Canvas, in order for them to create a password and access the system.

Create as a Customer Admin

Create as a Tutor   
If neither Customer Admin or Tutor is checked, the user will be created as a Learner by default.

5

## How to create multiple learners:

- Click on the tab '**Bulk Add Learners**'.
- Download the CSV template (or use a previous one).
- Enter users' full names, email addresses, display names, and sortable names.

|   | A         | B              | C            | D             |
|---|-----------|----------------|--------------|---------------|
| 1 | full_name | email          | display_name | sortable_name |
| 2 | John Doe  | john@gmail.com | john_doe     | John Doe      |
| 3 |           |                |              |               |

- Upload the file by clicking the '**Upload learner template file**' button.
- You will see up to five recent uploads in the '**Recent Imports**' section. If any warnings were raised during upload process, click the 'warnings.csv' link.

The screenshot shows the 'User Creation' interface. At the top, there are two tabs: 'Add Individual User' and 'Bulk Add Learners'. A callout '1' points to the 'Bulk Add Learners' tab. Below the tabs, there are two steps:

**Step 1**  
Download the template file to import your data.  
**Only Learners can be uploaded via a bulk import.** Please ensure you are happy with any **Learner** data before uploading this file. You will not be able to make any changes once confirmed.  
A red button labeled 'Download learner template file' is present.

Notify Learner via email  
If unchecked, the login URL and user email will need to be communicated with the Learner outside of Canvas, in order for them to create a password and access the system.

**Step 2**  
Upload the Learner template file with your data. This process may take a few minutes depending on file size. You can leave the page and come back.  
A red button labeled 'Upload learner template file' is present.

**Recent imports**

| File  | Import time        | Warnings                     |
|---|--------------------|------------------------------|
| <a href="#">bulk_create_users_template_test.csv</a> | June 16 2023 14:50 | No Warnings                  |
| <a href="#">bulk_create_users_template.csv</a>      | June 16 2023 14:48 | <a href="#">warnings.csv</a> |

Callouts 2, 4, and 5 are positioned on the left side of the interface, pointing to the 'Download learner template file' button, the 'Upload learner template file' button, and the 'Recent imports' section respectively.

## How to remove a user from SmartScreen:

- After their subscription or licence ends, learners and tutors will no longer have access to the products.

2. To permanently remove a user from SmartScreen, please contact our Customer Support by emailing [digitalsales@cityandguilds.com](mailto:digitalsales@cityandguilds.com) or call the team on 01924 206709.

## The Product Allocation Tab

The **'Product Allocation'** tab allows you to allocate tutors and learners to the products you have purchased.

1. You can search for a specific learner via the search function, or learners are organised alphabetically in the list.
2. You can allocate products to a learner by clicking on the pen icon on the right-hand side of the screen.

Product Allocation

Allocate tutors and learners to SmartScreen products

1

| Canvas User ID | User            | Role    | SmartScreen User ID | Email                      | Number of Licences and Subscriptions |   |
|----------------|-----------------|---------|---------------------|----------------------------|--------------------------------------|---|
| 2237           | Benjamin Bailey | Learner | ET101584_777790     | Ben@getnada.com            | 1                                    | 2 |
| 2225           | Bill Smith      | Learner | ET101572_777790     | bill.smith@getnada.com     | 1                                    |   |
| 2226           | Graham Johnson  | Learner | ET101573_777790     | graham.johnson@getnada.com | 1                                    |   |
| 2247           | Hannah Williams | Learner | ET101592_777790     | hannahwilliams@getnada.com | 0                                    |   |
| 2246           | Harry Johnson   | Learner | ET101591_777790     | harryjohnson@getnada.com   | 1                                    |   |
| 2243           | John Smith      | Learner | ET101588_777790     | johnsmith@getnada.com      | 0                                    |   |
| 2224           | Katie Kirby     | Learner | ET101571_777790     | katie.kirby@getnada.com    | 0                                    |   |
| 2248           | Mohammad Hassan | Learner | ET101593_777790     | mohammadhassan@getnada.com | 0                                    |   |

3. Once you have selected the product for the tutor or learner in question, click **'Save Changes'**.

Purchases User Creation **Product Allocation** Review Enrolments Learner Allocation Enrolment Tool Support

### Product Allocation

Allocate tutors and learners to SmartScreen products

| Canvas User ID | User            | Role    | SmartScreen User ID | Email                      |
|----------------|-----------------|---------|---------------------|----------------------------|
| 2237           | Benjamin Bailey | Learner | ET101584_777790     | Ben@getnada.com            |
| 2225           | Bill Smith      | Learner | ET101572_777790     | bill.smith@getnada.com     |
| 2226           | Graham Johnson  | Learner | ET101573_777790     | graham.johnson@getnada.com |
| 2247           | Hannah Williams | Learner | ET101592_777790     | hannahwilliams@getnada.com |
| 2246           | Harry Johnson   | Learner | ET101591_777790     | harryjohnson@getnada.com   |
| 2243           | John Smith      | Learner | ET101588_777790     | johnsmith@getnada.com      |
| 2224           | Katie Kirby     | Learner | ET101571_777790     | katie.kirby@getnada.com    |
| 2248           | Mohammad Hassan | Learner | ET101593_777790     | mohammadhassan@getnada.com |

### Edit Products

Hannah Williams

6100 Level 2/3 Professional Cookery: Enhanced x

3

To view and edit licences and subscriptions assigned to a learner, click on the pen icon again.

### Edit Products

Primary User

- Level 2 Diploma in Plumbing Studies x
- Level 2 Autocare Technician (up to 50 us) x
- L2 Dip LV Maintenance Enhanced up to 50 x
- L3 Electrotech qualification x

To add a licence or subscription to a learner, select the product in the **'Select Product'** drop-down and then click **'Save Changes'**.

- To remove the licence or subscription click on the **'x'** button and then click **'Save Changes'**.

# The Review Enrolments Tab

The **'Review Enrolments'** tab is where you can review, and then approve or reject learners' and tutors' self-enrolments for allocated subscriptions.

**1** Review Enrolments  
Select tutor or learner enrolment submissions to approve or reject

Q

| Canvas User ID | User   | Role    | SmartScreen User ID | Email                            | Product   | Date of request | Status   |
|----------------|--|---------|---------------------|----------------------------------|---|-----------------|----------|
| 1322           | <input type="checkbox"/> bulkwarningtest1      | Learner | ET100764_999990     | bulkwarningtest1@getnada.com     | 7513 Level 3 Diploma in Social Media for Business | 07/02/2024      | approved |
| <b>2</b> 1323  | <input type="checkbox"/> bulkwarningtest2      | Tutor   | ET100765_999990     | bulkwarningtest2@getnada.com     | 7513 Level 3 Diploma in Social Media for Business | 07/02/2024      | approved |
| 1405           | <input type="checkbox"/> Charlie Evans (Tutor) | Tutor   | ET100796_999990     | charlie.evans2@cityandguilds.com | 7513 Level 3 Diploma in Social Media for Business | 13/02/2024      | approved |

1. To approve or reject an enrolment, find the learner by entering their name.
2. Select the enrolment you want to action.

|      |  |         |                 |                             |   |            |          |
|------|--|---------|-----------------|-----------------------------|---|------------|----------|
| 1223 | <input checked="" type="checkbox"/> David Kingfisher | Learner | ET100703_999990 | davetest@getnada.com        | 2394/2395 Level 3 Award in Inspection and Testing                     | 18/01/2024 | pending  |
| 1292 | <input type="checkbox"/> leanera_999990              | Learner | ET100740_999990 | leanera_999990@getnada.com  | 7513 Level 3 Diploma in Social Media for Business                     | 15/02/2024 | approved |
| 1288 | <input type="checkbox"/> learner1_999990             | Learner | ET100737_999990 | learner1_999990@getnada.com | 6219 Entry 3/Level 1 Award/Certificate/Diploma in Construction Skills | 05/02/2024 | approved |
| 1303 | <input type="checkbox"/> learner2_999990             | Learner | ET100750_999990 | learner2_999990@getnada.com | 7513 Level 3 Diploma in Social Media for Business                     | 08/02/2024 | approved |

1 Enrolment selected

Reject Approve

**3**

3. Click the **'Approve'** or **'Reject'** button. The learner will receive an Inbox message in SmartScreen as well as an email to notify them of the decision.

# The Learner Allocation Tab

The **'Learner Allocation'** tab will allow you to assign topics and learners to tutors.

- Tutors will be automatically assigned to all packages on which their learners are enrolled.
- Tutors' enrolment in packages will take place after the syncs at 05:00, 8:00, 10:00, 12:00, 14:00, 17:00 and 20:00 UK time.
- Tutors will only be able to see products and self-registration requests associated with topics assigned to them in the enrolment tool.

| Tutor             | Topic  | Number of Learners |
|-------------------|--|--------------------|
| New Tutor         | Transport Maintenance  | 1                  |
| Ninety Tutor      | Learning, Transport Maintenance  | 1                  |
| Tutornew19_999990 | Transport Maintenance, Beauty and Complementary Therapies, Construction, Learning, Employability | 2                  |

1. Use the search function to find the relevant tutor.
2. Click on the pen icon to open the editing menu.

**Important note:** the same learner cannot be assigned to more than one tutor for the same topic.

**Edit Tutor**  
Jane Doe

Q Choose Topic

Assigned Topics

Q Choose Learner

Assigned Learners

Cancel Save Changes

- Select the topic from the **'Choose Topic'** drop-down field and click the **'Save Changes'** button.
- Select the learner from the **'Choose Learner'** drop-down field and click the **'Save Changes'** button.

If you have any questions about the enrolment tool, please contact our Digital Sales [digitalsales@cityandguilds.com](mailto:digitalsales@cityandguilds.com) team or fill in a short form on the '**Enrolment tool support**' tab.

Purchases   User Creation   Product Allocation   Review Enrolments   Learner Allocation   **Enrolment Tool Support**

### Enrolment Tool Support

**Centre Number**

**Name**

**Email**

**Telephone (optional)**

**SmartScreen User ID (optional)**

**Please describe your issue**

## 5. Simple Steps to follow for Assigning Licences to Tutors or Learners

1. Access the 'Purchases' tab in the 'Enrolment Tool'.

**1**

Purchases User Creation Product Allocation Review Enrolments Learner Allocation Enrolment Tool Support

### Licences and Subscriptions

Select purchases to assign tutors and learners

Bulk assign with template

Q

| Product Name  | SS Code          | Product Type | Topic                    | Licences Available | Start Date | End Date   |
|---|------------------|--------------|--------------------------|--------------------|------------|------------|
| <input checked="" type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 90/90              | 22/01/2024 | 21/01/2025 |
| <input type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced                            | SS0129-6100-02   | Subscription | Hospitality and Catering | -                  | 22/01/2024 | 21/01/2025 |

2. Select the Licence Product you wish to assign learners to and click on 'Assign Learners' or 'Assign Tutors'.

**2**

Purchases User Creation Product Allocation Review Enrolments Learner Allocation Enrolment Tool Support

### Licences and Subscriptions

Select purchases to assign tutors and learners

Bulk assign with template

Q

| Product Name  | SS Code          | Product Type | Topic                    | Licences Available | Start Date | End Date   |
|---|------------------|--------------|--------------------------|--------------------|------------|------------|
| <input checked="" type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 90/90              | 22/01/2024 | 21/01/2025 |
| <input type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced                            | SS0129-6100-02   | Subscription | Hospitality and Catering | -                  | 22/01/2024 | 21/01/2025 |

1 Purchase selected

Assign Tutors Assign Learners



3. Select the learners you wish to assign and click **'Assign Learners'** or **'Assign Tutors'**.

The screenshot shows the 'Licences and Subscriptions' section of a software interface. At the top, there are navigation tabs: Purchases, User Creation, Product Allocation, Review Enrolments, Learner Allocation, and Enrolment Tool Support. The main area contains a search bar and a table with the following columns: Product Name, SS Code, Product Type, Topic, Licences Available, Start Date, and End. Two rows are visible: one for '7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles' (checked) and one for '6100 Level 2/3 Professional Cookery: Enhanced'. Below the table, it says '1 Purchase selected' and has 'Assign Tutors' and 'Assign Learners' buttons. A modal window titled 'Assign Learners' is open on the right, showing details for '7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles' and a search bar. Below the search bar, it lists 'Charlie Learner' with ID 'ET101547\_777790' and email 'charlielearner1@getnada.com'. At the bottom of the modal are 'Cancel' and 'Assign Learners' buttons, with a circled '3' next to the latter.

4. The Tutor or Learner will then be able to log in and accept or decline the course. Once the course has been accepted, the tutor or learner will be able to access it.

The screenshot shows a Canvas LMS dashboard. On the left is a red navigation sidebar with icons for Account, Dashboard, Courses, Calendar, Inbox, History, Enrol In A Course, and Help. The main content area features a notification banner at the top: 'You have been invited to join 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles with the following user role: Learner'. Below this are 'Decline' and 'Accept' buttons, with a circled '4' next to the 'Accept' button. Below the notification are two informational messages: 'Welcome to Canvas! You've enrolled in one or more courses that have not started yet...' and 'Notifications. Tell us how and when you would like to be notified of events in Canvas.' Below these is a 'Dashboard' section with a card for '7290 Level 1 to Level 3 Award in E...'.

## 6. Simple Steps to follow for adding Tutors or Learners to Subscription Products

1. Go to the 'Purchases' tab in the 'Enrolment Tool'.

1

Purchases User Creation Product Allocation Review Enrolments Learner Allocation Enrolment Tool Support

### Licences and Subscriptions

Select purchases to assign tutors and learners

Bulk assign with template

Q

| Product Name   | SS Code          | Product Type | Topic                    | Licences Available | Start Date | End Date   |
|--|------------------|--------------|--------------------------|--------------------|------------|------------|
| <input type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 85/90              | 22/01/2024 | 21/01/2025 |
| <input checked="" type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced      | SS0129-6100-02   | Subscription | Hospitality and Catering | -                  | 22/01/2024 | 21/01/2025 |

1 Purchase selected

Assign Tutors Assign Learners

2. On the 'Purchases' tab, select the Subscription Product and click on 'Assign Tutor' or 'Assign Learner'.

Purchases User Creation Product Allocation Review Enrolments Learner Allocation Enrolment Tool Support

### Licences and Subscriptions

Select purchases to assign tutors and learners

Bulk assign with template

Q

| Product Name   | SS Code          | Product Type | Topic                    | Licences Available | Start Date | End Date   |
|--|------------------|--------------|--------------------------|--------------------|------------|------------|
| <input type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 86/90              | 22/01/2024 | 21/01/2025 |
| <input checked="" type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced      | SS0129-6100-02   | Subscription | Hospitality and Catering | -                  | 22/01/2024 | 21/01/2025 |

1 Purchase selected

Assign Tutors Assign Learners

2

3. Select the Tutors or Learners you wish to assign to the Subscription and click **'Assign Tutors'** or **'Assign Learners'**.

The screenshot shows the 'Licences and Subscriptions' page with a table of products. The '6100 Level 2/3 Professional Cookery: Enhanced' subscription is selected. A modal titled 'Assign Tutors' is open on the right, showing a search bar and a list of available tutors. The 'Assign Tutors' button is highlighted with a red circle containing the number 3.

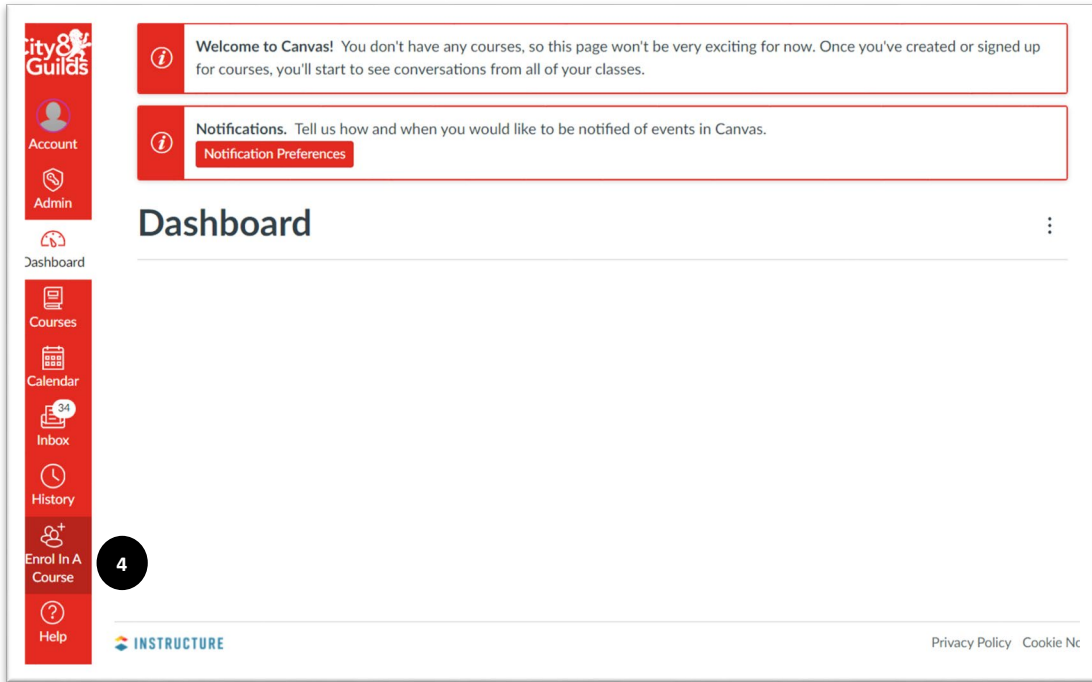
| Product Name   | SS Code          | Product Type | Topic                    | Licences Available | Start Date | End  |
|--|------------------|--------------|--------------------------|--------------------|------------|------|
| <input type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 86/90              | 22/01/2024 | 21/0 |
| <input checked="" type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced      | SS0129-6100-02   | Subscription | Hospitality and Catering | -                  | 22/01/2024 | 21/0 |

The screenshot shows the 'Licences and Subscriptions' page with the same table as above. A modal titled 'Assign Learners' is open on the right, showing a search bar and a list of available learners. The 'Assign Learners' button is highlighted with a red circle containing the number 3.

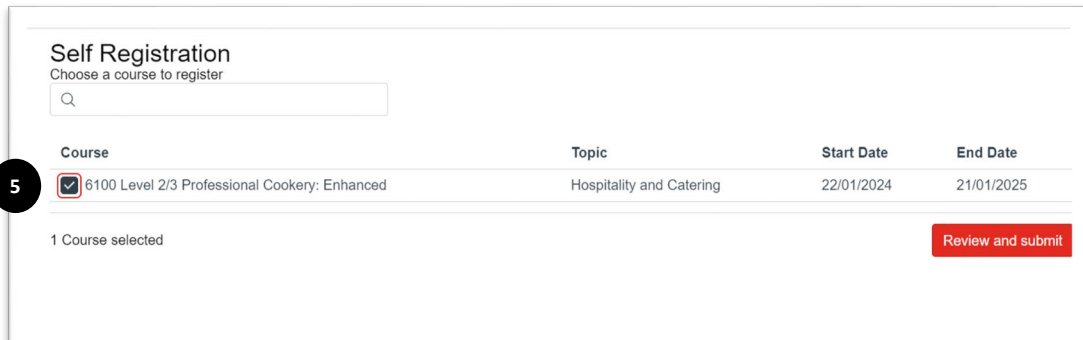
| Product Name   | SS Code          | Product Type | Topic                    | Licences Available | Start Date | End  |
|--|------------------|--------------|--------------------------|--------------------|------------|------|
| <input type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles | SS0144-7290EV1-3 | Licence      | Automotive               | 83/90              | 22/01/2024 | 21/0 |
| <input checked="" type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced      | SS0129-6100-02   | Subscription | Hospitality and Catering | -                  | 22/01/2024 | 21/0 |

4

4. The Learner or Tutor now needs to log in and click on **'Enrol in a Course'**.



- The Tutor or Learner selects the courses that have been made available to them.



- Once the Tutor or Learner has accepted the course, the Centre Admin now needs to give final approval by going to the **'Review Enrolments'** tab, selecting the Tutor or Learner in question and clicking **'Approve'**.

Purchases User Creation Product Allocation **Review Enrolments** Learner Allocation Enrolment Tool Support

### Review Enrolments

Select tutor or learner enrolment submissions to approve or reject

| Canvas User ID | User  | Role    | SmartScreen User ID | Email                      | Product                                       | Date of request | Status   |
|----------------|---|---------|---------------------|----------------------------|---|-----------------|----------|
| 2195           | <input type="checkbox"/> Even newer           | Tutor   | ET101550_777790     | evennewertutor@getnada.com | 6100 Level 2/3 Professional Cookery: Enhanced | 11/03/2024      | pending  |
| 2191           | <input type="checkbox"/> Learner 33           | Learner | ET101546_777790     | learner33@getnada.com      | 6100 Level 2/3 Professional Cookery: Enhanced | 11/03/2024      | approved |
| 2193           | <input checked="" type="checkbox"/> New Tutor | Tutor   | ET101548_777790     | newtutor@getnada.com       | 6100 Level 2/3 Professional Cookery: Enhanced | 11/03/2024      | pending  |
| 2188           | <input type="checkbox"/> Tutor_one            | Tutor   | ET101543_777790     | Tutor_one@getnada.com      | 6100 Level 2/3 Professional Cookery: Enhanced | 11/03/2024      | approved |
| 2189           | <input type="checkbox"/> Tutor_two            | Tutor   | ET101544_777790     | Tutor_two@getnada.com      | 6100 Level 2/3 Professional Cookery: Enhanced | 11/03/2024      | approved |

1 Enrolment selected Reject Approve

6

7. The Tutor or Learner will now be able to access the material.

The screenshot shows the City & Guilds dashboard. At the top, there is a notification banner: "Invitation accepted! Welcome to 6100 Level 2/3 Professional Cookery: Enhanced!". Below this is the "Dashboard" header. The main content area is divided into two sections: "Published Courses (1)" and "Unpublished Courses (0)". Under "Published Courses (1)", there is a card for "6100 Level 2/3 Professional Cook...". A black circle with the number "7" is overlaid on the course card. The left sidebar contains navigation options: Account, Admin, Dashboard, Courses, Calendar, Inbox (34), History, Enrol In A Course, and Help.

7

## 7. Accessing SmartScreen content

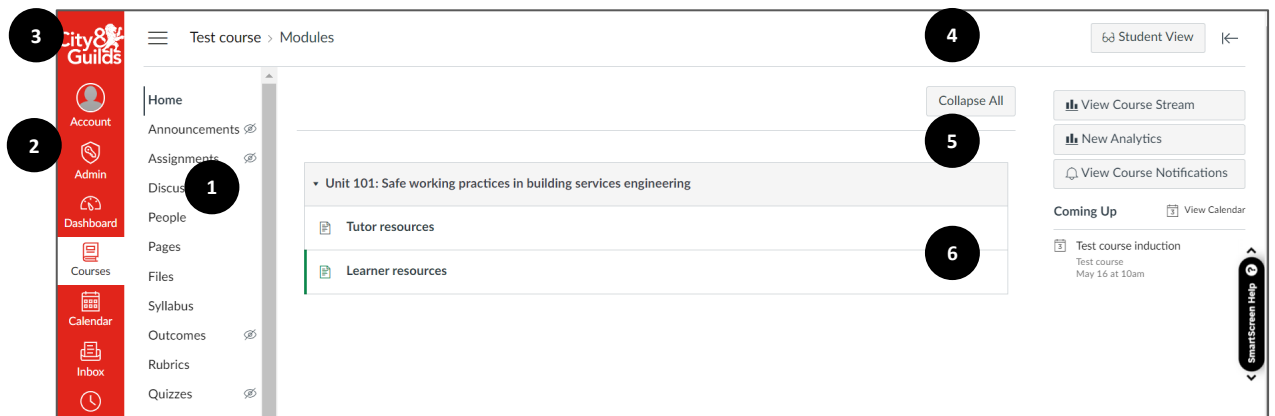
As a tutor, there are two ways to access packages that have been allocated to you:

1. **Dashboard** menu.
2. **Courses** menu.



**Important note:** If you cannot see a package you are looking for, contact your Centre Admin to check you if it was allocated to you.

To access the package, click on the title.



1

You will see a list of resources. Elements of Tutor resources (such as schemes of work and answer sheets) are not visible to learners. Click on the name of the relevant category to open the list of files.

2

The course menu may depend on the type of package. The eye-slash icon shows menu options not available to learners. Some menu options might not be in use and will appear blank.

3

To minimise the course menu, click on the three lines.

4

To see the learner view, click on the '**Student View**' button.

5

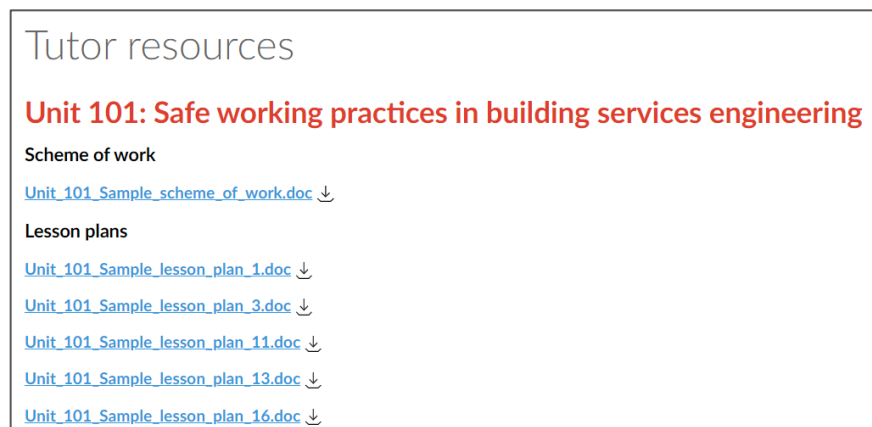
You can view course statistics, click the '**New Analytics**' button.

6

You can see events added to the **Calendar** for this package.

### How to download files:

- Click on the relevant unit.
- A list of files will open in a new page.
- Click on the file name to view a file in SmartScreen or click on the download button to download it.



### Opening e-learning resources:

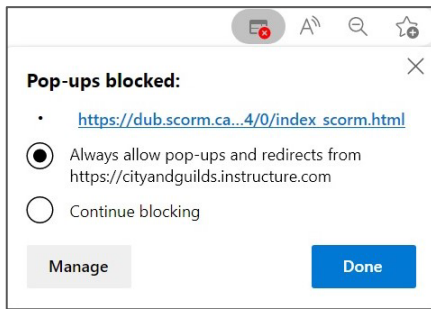
e-learning resources are located in the '**Assignments**' tab of the package.

Some e-learning materials will open in a new pop-up window which can be blocked. To allow access:

1. Click on the '**Pop-up blocked**' in the URL address.



2. Click 'Always allow pop-ups and redirects from <https://cityandguilds.instructure.com>'.



3. Click **'Done'**.

Other useful menu options:

- **Discussions** – view existing discussions and create new discussions. They will not be visible to learners.
- **People** – see the list of users enrolled on the course.
- **Pages** – list of the content covered by the package.
- **Modules** – list of all units in the package.

**New Analytics** – an interactive tool that helps you and your learners better track performance and activity within the package. The tool shows which learners have viewed pages, resources and participated in assignments.



## 8. SmartScreen reporting

You can monitor how people are using the learning materials on SmartScreen. This is a great way to see your learners' activity time, and what material they are currently working on or have completed.

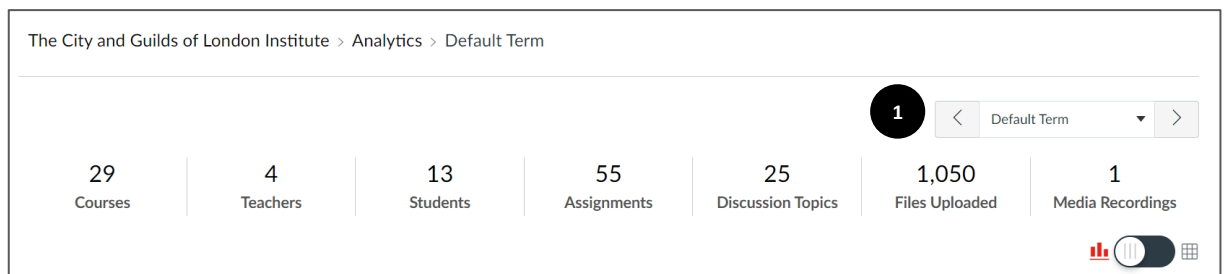
SmartScreen has two reporting options:

- Analytics – an overview of user activity,
- Reports – generate detailed reports related to your tutors and learners.

### SmartScreen Analytics

To access Analytics, go to the '**Admin**' menu.

Account analytics shows you how many products, tutors (called Teachers in Analytics), learners (called Students in Analytics), assignments and discussions are active.

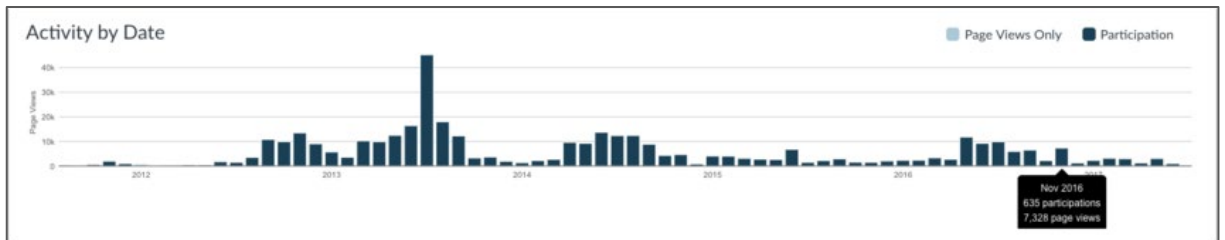


For each term, Analytics includes the following overview:

- **Courses** indicates the number of active products in your account.
- **Teachers** indicates how many unique tutors have had activity within the selected term. If one user is a tutor in five packages, the statistic will show as one tutor.
- **Students** indicates the same statistics as tutors but relate to learners.
- **Assignments** indicates the number of assignments submitted to the active product.
- **Discussion Topics** indicates the number of discussion topics posted to products.
- **Files Uploaded** indicates the number of files uploaded by City & Guilds to your products.
- **Media Recordings** indicate the number of media objects uploaded by City & Guilds to active packages, such as video, audio, and music files.

By default, analytics are shown in a graph format. There are three types of graphs: Activity by Date, Activity by Category, and Grade Distribution.

The **Activity by Date** graph shows all activity for all users enrolled in a package. The x-axis represents the dates, while the y-axis represents the number of page views. Dark blue bars represent participation in the account. If a date only includes page views, the bar displays as light blue.

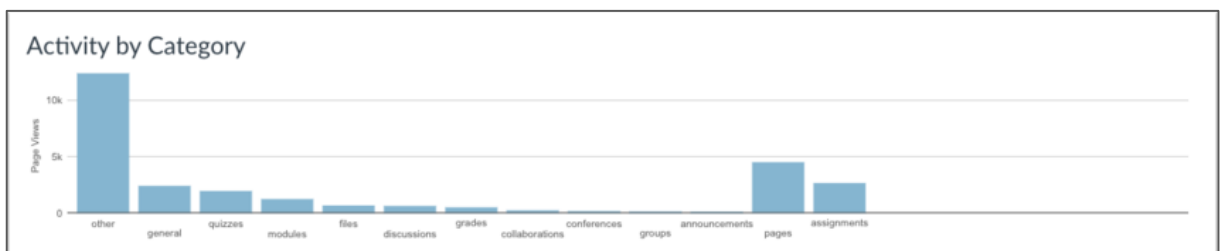


The graph changes the bar display according to the length of time:

- Activity that is less than six months old displays bars as daily activity. At six months bars are displayed as weekly activity, and at approximately a year, bars are displayed as monthly activity.
- The weekly view shows the first and last date for the week; the monthly view shows the month and the year.

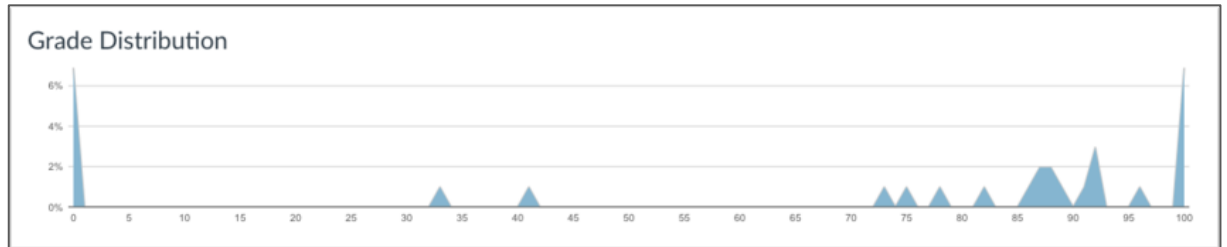
To view the details of the bar graph, hover over the specific bar you want to view. Browser window size, zoom level, and screen resolution may also change how the bars display.

The **Activity by Category** graph shows all activity in the account by feature category. The x-axis represents activity by category, while the y-axis represents the number of page views. The General category refers to the top-level page views of the package that are not counted in the more specific categories. The Other category refers to all the other page views that were not recognised.



To view the details of the bar graph, hover over the specific bar you want to view.

The **Grade Distribution** graph shows the distribution of grades for all enrolled learners for packages with assignments. The x-axis represents the percentage of grades, while the y-axis represents the percentage of active and concluded enrolments.



The graph bars are shown as peaks representing the grades for the majority of learners on the continuum. A peak on the left end of the chart could mean learners are struggling with a package. A peak on the right end of the chart could mean learners are responding to package material and participating in the package.

To view the details of the bar graph, hover over the specific bar you want to view.

### View Analytics in table format

To view analytics without hovering over graph columns, you can view all data in a table format. To switch to the table format, click the Analytics icon (screenshot below). The icon will switch from the left side to the right, indicating the current analytics view.



Tables apply to every graph on its respective page, and each column defines the data within its respective graph. Graphical data is displayed by column.

Each table is paginated to 30 entries per page; additional pages can be viewed by advancing to the next page.

## SmartScreen reports

To access SmartScreen reports:

- Click on **'Admin'**.
- Click on your centre number.
- Click on **'Settings'**.
- Click on the **'Reports'** tab.

SmartScreen has several pre-set reports that can provide you with detailed information on grades, usage, user activity, etc. You will find more details about the most relevant reports below.

- 1 To view a description of each report, click on the '?' button. See the next page.
- 2 To run a report, click the 'Configure' or 'Run Report' button. If you click the 'Configure' button, you will be required to enter parameters to run the report. Please select the option 'All Terms'. See the next page.
- 3 If any admin or tutor has generated a report, you can download the result. See the next page.

| Admins   Announcements   Reports   Apps |   |  |  |
|---|---|--|--|
| Name                                    | Last Run                                      | Run Report   |  |
| Course Storage ? <b>1</b>               | Never   | Configure... <b>2</b>  |  |
| Eportfolio Report ?                     | Never   | Configure...   |  |
| Grade Export ?                          | Never   | Configure...   |  |
| LTI Report ?                            | Never   | Configure...   |  |
| Last Enrollment Activity ?              | May 9 at 1:04pm (Term: All Terms;) ↓ <b>3</b> | Configure...   |  |
| Last User Access ?                      | Never   | Configure...   |  |
| Multiple Grading Periods Grade Export ? | Never   | Configure...   |  |
| Outcome Export ?                        | Never   | Run Report   |  |
| Outcome Results ?                       | Never   | Configure...   |  |
| Proserv Provisioning Report ?           | Never   | Configure...   |  |
| Provisioning ?                          | Never   | The report is running.<br>You'll receive an email when it is done. |  |

### Key SmartScreen reports:

1. **Grade Export** – this report shows the final grade results for all learners. The resulting CSV file will have one row per enrolment and will show the current and final grades.
2. **Last User Access** – this report shows the last login for active users. Please note, 'Last Access At' is updated once every 10 minutes. That is our current threshold to determine the activity for any given user session.
3. **Outcome Results** – this report shows the learning outcome results for all learners. The resulting CSV file will have one row per user-outcome-result pair and will show the details of the result including the associated assignment.
4. **Provisioning** – this report will export all the relevant information that relates to registered users, admin/tutors, packages, enrolments and other categories.
5. **User Course Access Log** – this report shows all the activity from users enrolled in all packages. The resulting CSV file will have one row per learner

activity. A maximum of one month's data will be retrieved. By default, it will return data from the beginning of the previous week.

6. **Zero Activity** – this report shows all the learners enrolled in any course. The resulting CSV file will have one row for all learners that have not visited the course in the dates you are searching for.

## Using the Calendar function

The **Calendar** function allows Learners to create personal events to track any activity related to SmartScreen content. You can also create events associated with certain packages that will be visible to all learners and tutors enrolled on these packages.

### To create an event:

1. Click on '**Calendar**' in the main menu.
2. Click on '+' button.
3. In the new window enter details of the event.
4. Click '**Submit**'.

The screenshot displays the SmartScreen interface. On the left, a red sidebar contains navigation icons: Account, Admin, Dashboard, Courses, Calendar (highlighted with a '1'), Inbox, History, Enrol In A Course, and Help. The main content area shows a calendar for May 2023. The calendar grid has columns for SUN, MON, TUE, WED, THU, FRI, and SAT. A '12:05a Test event' is visible on Wednesday, May 10th. In the top right corner of the calendar view, there is a '+' button highlighted with a '2'. To the right of the calendar grid is a sidebar with a calendar navigation widget for May 2023, a 'CALENDARS' section listing 'Jane Smith', and an 'UNDATED' section with a 'Calendar Feed' option. A vertical 'SmartScreen Help' button is located on the far right edge of the interface.

Edit Event ✕  
 Event Event  
 Title:  
  
 Date:  
 📅  
 From: To:  
 ▼  ▼  
 Location:  
  
 Calendar:  
 ▼

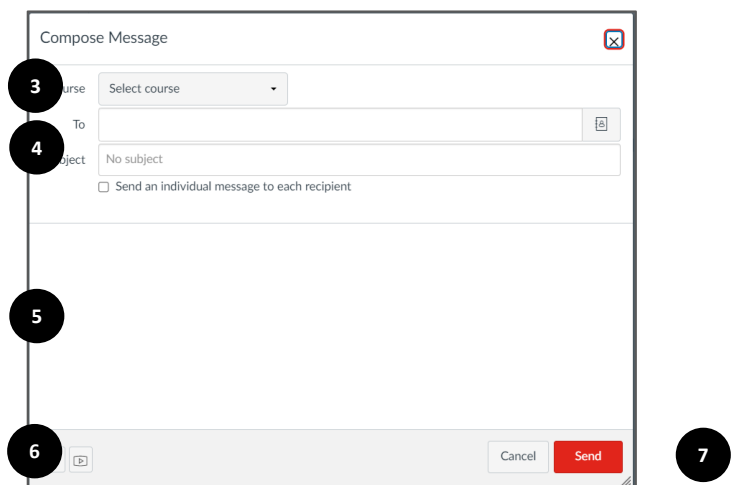
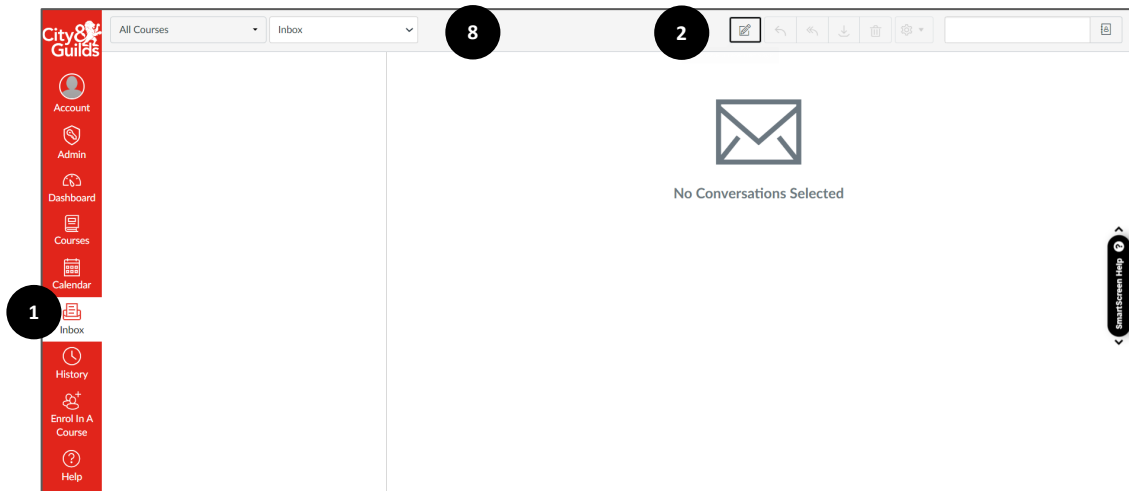
Created events will be visible on the **'Dashboard'**.

### Using the Inbox function

SmartScreen has an internal messaging function. Centre Administrators and Tutors can message all users. Learners can only reply to received messages. After the message is sent it will trigger an email notification to the recipient which includes the text of the message.

#### To send a message:

1. Click on **'Inbox'** in the main menu.
2. Click on the pencil icon.
3. If you are enrolled on the product and the message is related to it, select the required product from the drop-down menu.
4. Start entering the recipient's name or click on the person icon to see all users.
5. Enter subject and text.
6. You can attach a file or record a video.
7. Click **'Send'**.
8. To view sent messages, select **'Sent'** from the drop-down menu.



### Here to help

You can find links to the User Guides and SmartScreen webpages in the **'Help'** menu.

The **'SmartScreen Help'** button on the right-hand side of the screen provides relevant support articles based on the page you are on. Click on it to view help articles related to the page you are interested in. The button can be moved around the screen.

If you have a question, which has not been answered here, do not forget that we have a SmartScreen team to support you.

Email [digitalsales@cityandguilds.com](mailto:digitalsales@cityandguilds.com) or call the team on 01924 206709. Calls to this number are charged at local rates.

## Appendix 1: SmartScreen roles matrix

| SmartScreen Activity   | Customer Admin | Tutor | Learner |
|--|----------------|-------|---------|
| View the list of users                                       | ✓              | ✓     | ✗       |
| Create new users   | ✓              | ✓     | ✗       |
| Set users as Customer Admins or Tutors                       | ✓              | ✓     | ✗       |
| Remove users*  | ✗              | ✗     | ✗       |
| View list of purchased packages**                            | ✓              | ✓     | ✗       |
| Access package content**                                     | ✗              | ✓     | ✓       |
| Access e-learning materials**                                | ✗              | ✓     | ✓       |
| View course announcements**                                  | ✓              | ✓     | ✓       |
| View and create discussions**                                | ✗              | ✓     | ✗       |
| View list of people enrolled into a product and their role** | ✓              | ✓     | ✗       |
| Create collaborations**                                      | ✗              | ✗     | ✗       |
| Participate in a collaboration**                             | ✗              | ✗     | ✗       |
| View New Analytics**   | ✗              | ✓     | ✗       |
| Assign learners to packages                                  | ✓              | ✓     | ✗       |
| Send enrolment requests via the 'Enrol In A Course' button   | ✗              | ✓     | ✓       |
| Review enrolment requests from the learners                  | ✓              | ✓     | ✗       |



|  |   |   |   |
|--|---|---|---|
| Manage allocations of products and learners to tutors                  | ✓ | ✗ | ✗ |
| Send enquiries to City & Guilds via SmartScreen                        | ✓ | ✗ | ✗ |
| View analytics on the institution level                                | ✓ | ✗ | ✗ |
| Run and view administrative reports                                    | ✓ | ✓ | ✗ |
| Manage own profile: name, picture, notification preferences, time zone | ✓ | ✓ | ✓ |
| Edit profiles of other users*  | ✗ | ✗ | ✗ |
| Create private calendar events   | ✓ | ✓ | ✓ |
| Create calendar events associated with products**                      | ✗ | ✓ | ✗ |
| Send messages to other SmartScreen users                               | ✓ | ✓ | ✗ |
| Reply to received messages   | ✓ | ✓ | ✓ |
| Access 'Help' menu   | ✓ | ✓ | ✓ |
| Access Customer Admin and Tutor guides in the 'Help' menu              | ✓ | ✓ | ✗ |
| Access Learner guide in the 'Help' menu                                | ✓ | ✓ | ✓ |

\* Please contact City & Guilds SmartScreen support

\*\* Available only to users who are enrolled into a product

## Contact us

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general.enquiries@cityandguilds.com

01924 930 801

[www.cityandguilds.com](http://www.cityandguilds.com)

## About City & Guilds

Since 1878 we have worked with people, organisations and economies to help them identify and develop the skills they need to thrive. We understand the life changing link between skills development, social mobility, prosperity and success. Everything we do is focused on developing and delivering high-quality training, qualifications, assessments and credentials that lead to jobs and meet the changing needs of industry.

We work with governments, organisations and industry stakeholders to help shape future skills needs across industries. We are known for setting industry-wide standards for technical, behavioural and commercial skills to improve performance and productivity. We train teams, assure learning, assess cohorts and certify with digital credentials. Our solutions help to build skilled and compliant workforces.

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