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## SmartScreen

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# SmartScreen (powered by Canvas)

## User Guide for Customer Admins

Version 1.0

Last modified 25-March-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 product.

It is aimed at Customer Admins who will be responsible for purchasing SmartScreen products in Walled Garden, managing licenses and subscriptions as well as tutors and 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)

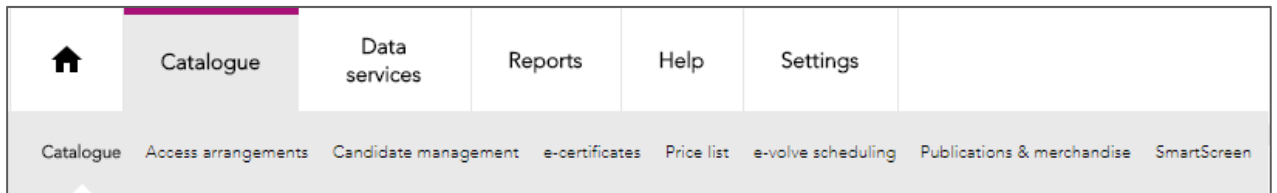
## 2. Order SmartScreen Products

Before accessing the teaching and learning materials on SmartScreen, you will need to purchase a subscription or license for the product on Walled Garden, our secure, online administration tool. If you cannot access Walled Garden, a colleague with administration rights can do this for you.

When purchasing a SmartScreen subscription, you can choose either an annual or a rolling subscription.

### To purchase a SmartScreen subscription on Walled Garden:

1. Log in to the Walled Garden [www.walled-garden.com](http://www.walled-garden.com)
2. Select 'Catalogue'.
3. Select 'SmartScreen'.

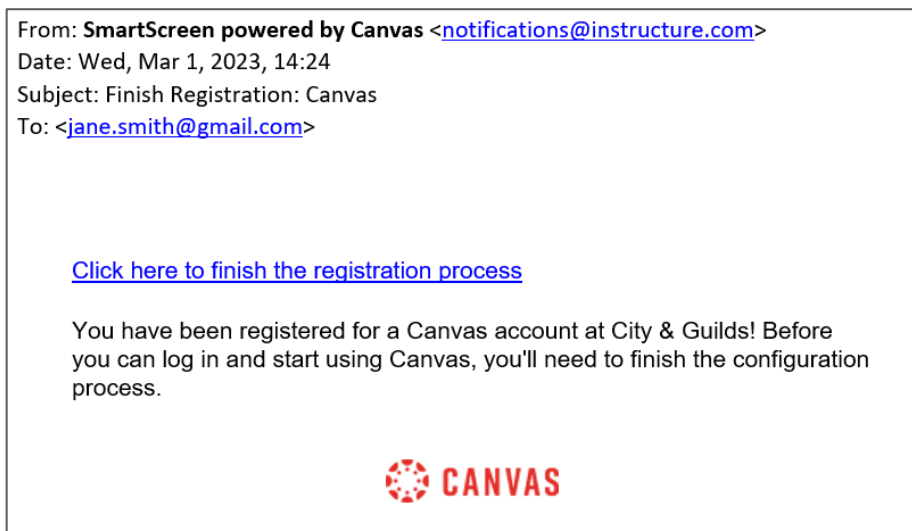


4. If you know the SmartScreen code, type it in the search box and click 'Show All'.
5. Select the item you want from the list.
6. Choose a start date.
7.
  - a. If purchasing a subscription, choose the type:
    - Annual – subscription lasts for a fixed 12-month period
    - Rolling – subscription will automatically renew each year
  - b. Or, if purchasing a licensed product, then choose Licence and enter the quantity.
8. Choose the SmartScreen administrator for the product.
9. Click 'Continue'.

Amend	Detail	Product code	Product description	Order type	Qty	Price	Total	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SS3748-02PLUS	SmartScreen subscription Functional Skills (3748) qualifications in Mathematics (Plus)	SmartScreen	1	350.00	350.00	<input type="checkbox"/>

Order total net	350.00	GBP
Customer discount <input type="text" value=""/>	-350.00	GBP
VAT/Sales tax	0.00	GBP
Order total	0.00	GBP

10. Enter your purchase order number in the 'Your PO/Ref' box.
12. Click 'Update Order'.
13. If you are a new Customer Admin, you will receive a welcome email from SmartScreen powered by Canvas [notifications@instructure.com](mailto:notifications@instructure.com) asking you to finish your registration.  
After clicking on 'Click here to finish the registration process' you will be redirected to a page where you can set the password for your account.



**Important note:** To make sure you receive notifications from SmartScreen powered by Canvas, please ask your IT department to whitelist the @instructure.com domain.

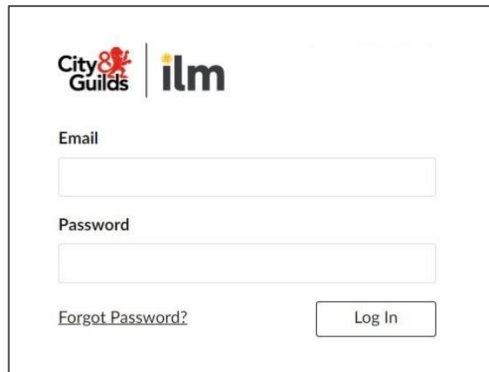
14. The item will be available in your SmartScreen account within 60 minutes of purchase.



### 3. Login and set up your SmartScreen profile

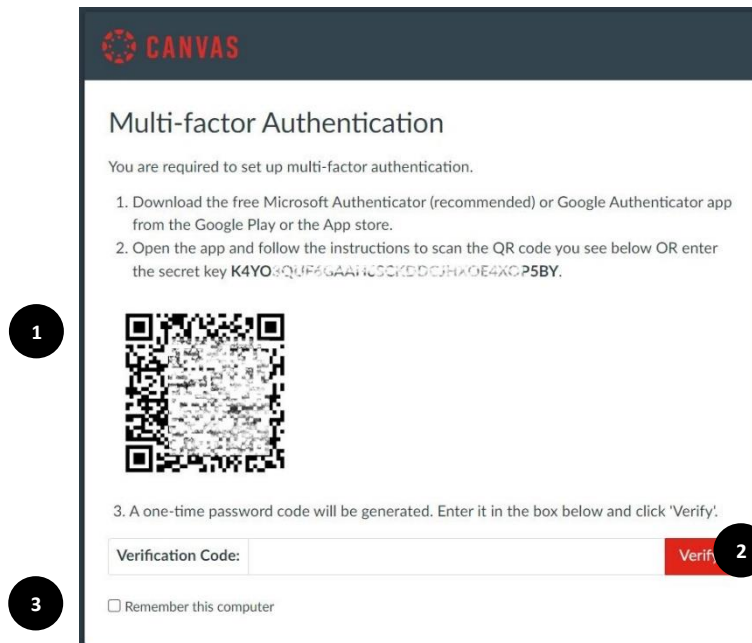
#### Account login:

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 City of Guilds ilm. It features the City of Guilds logo and the ilm logo at the top. Below the logos are two input fields: 'Email' and 'Password'. At the bottom left, there is a link for 'Forgot Password?' and at the bottom right, there is a 'Log In' button.

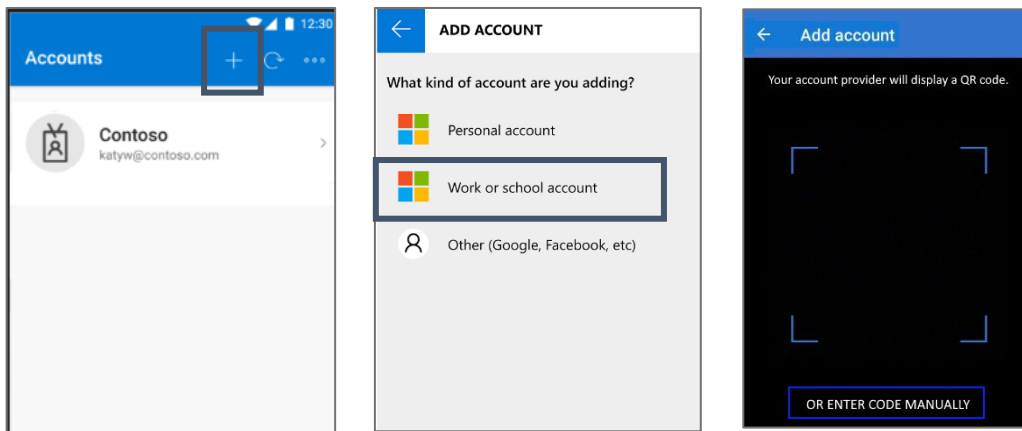
3. You will be asked to set up Multi-factor Authentication to confirm your identity. You will need to have a mobile phone on hand with **Microsoft Authenticator** (recommended) or **Google Authenticator** installed. These apps can be downloaded and installed via [App Store](#) or [Play Store](#).



The image shows the Canvas Multi-factor Authentication setup screen. It features the Canvas logo at the top left. The main heading is 'Multi-factor Authentication'. Below the heading, there is a message: '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. 2. Open the app and follow the instructions to scan the QR code you see below OR enter the secret key K4YO:8QJF6GAAI45CKDDG3HX9E4XC P5BY. Below the instructions is a QR code. Below the QR code, there is a message: '3. A one-time password code will be generated. Enter it in the box below and click 'Verify''. Below this message is a 'Verification Code:' input field and a red 'Verify' button. At the bottom left, there is a checkbox labeled 'Remember this computer'. Three numbered callouts (1, 2, 3) are placed around the screen: 1 points to the QR code, 2 points to the 'Verify' button, and 3 points to the 'Remember this computer' checkbox.

1. Open the authenticator app, set up a new entry for Canvas and either 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

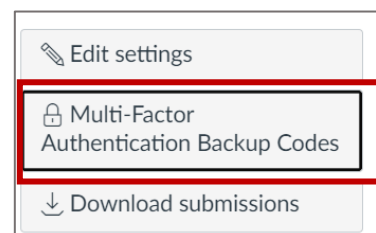
Enter the code generated by the app and click '**Verify**'.

3

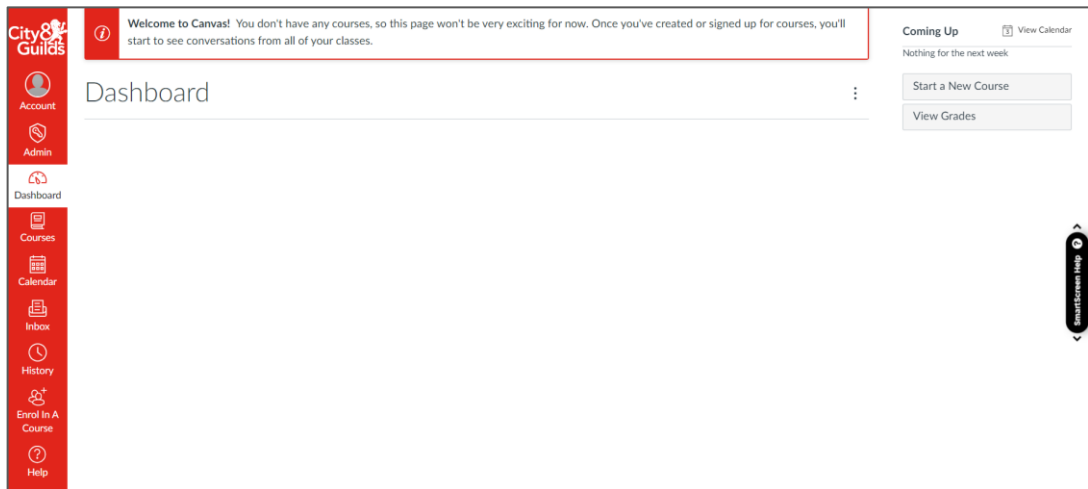
If you want multi-factor authentication to remember the computer you are using to log in to SmartScreen, click the '**Remember this computer**' checkbox.

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

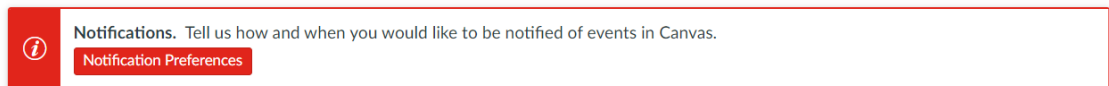
- Access your '**Account**' > '**Settings**' menu.
- Click on '**Multi-Factor Authentication Backup Codes**'.
- 10 backup codes will be generated.



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.

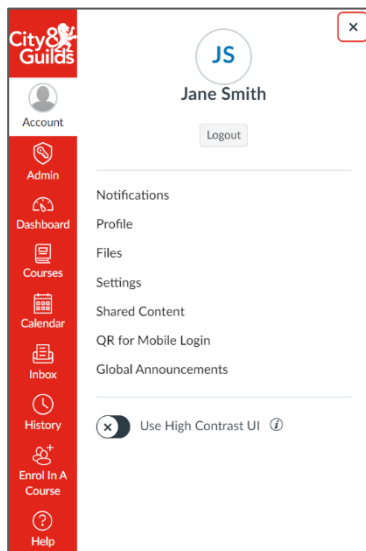


5. You can update your notifications preferences by clicking the **'Notification Preferences'** button on the banner on the **'Dashboard'** or via the **'Account'** menu.



### Set up your account:

To modify your account settings, access the **'Account'** menu via the main navigation menu. You will have access to the following options:



- **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.

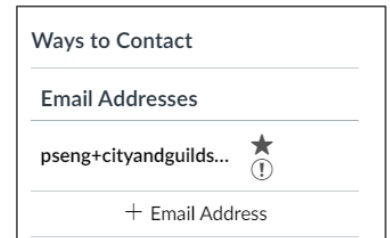
### How to add an additional email address:

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 Centre Administrator and, **also**, a Tutor (or Learner) so that you can enrol yourself on courses and view learning content, you will need to create yourself as a new user in the Enrolment Tool using a separate email address for the Tutor (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.

## 4. Overview of Admin menu options

Customer Admins and Tutors will have access to the 'Admin' menu option. This is where you can manage your tutors, learners, and packages.

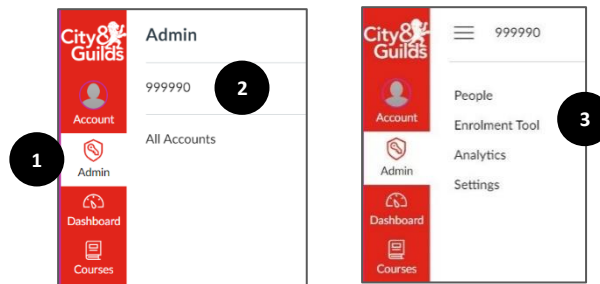
You will have access to the following options in the 'Admin' menu:

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 Customer Admins 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.

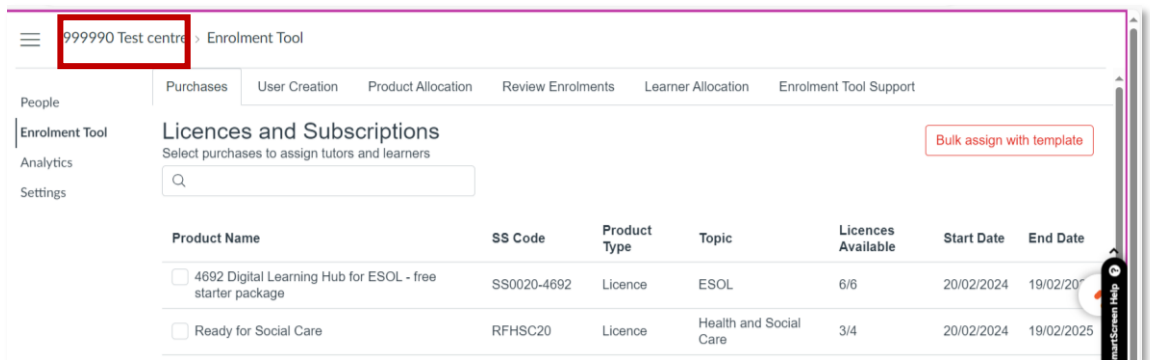
## 5. Overview of the Enrolment Tool

The 'Enrolment Tool' is where Customer Admins and Tutors can add learners and tutors to the system and then assign them to products. As a customer admin you will see all purchased products, while a tutor will only have visibility of the products they 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.



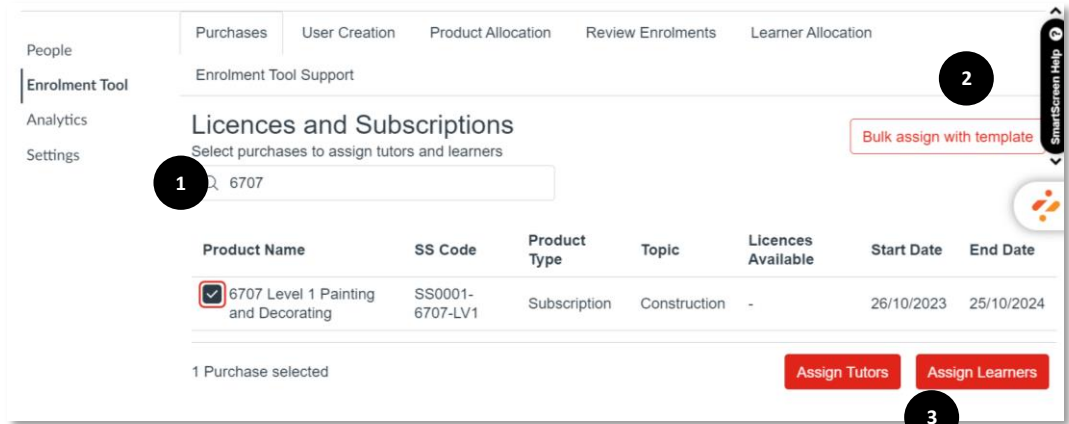
# The Purchases Tab

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

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 indicates if the product 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 '**Assign Tutors**' or '**Assign Learners**'.

**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

3

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

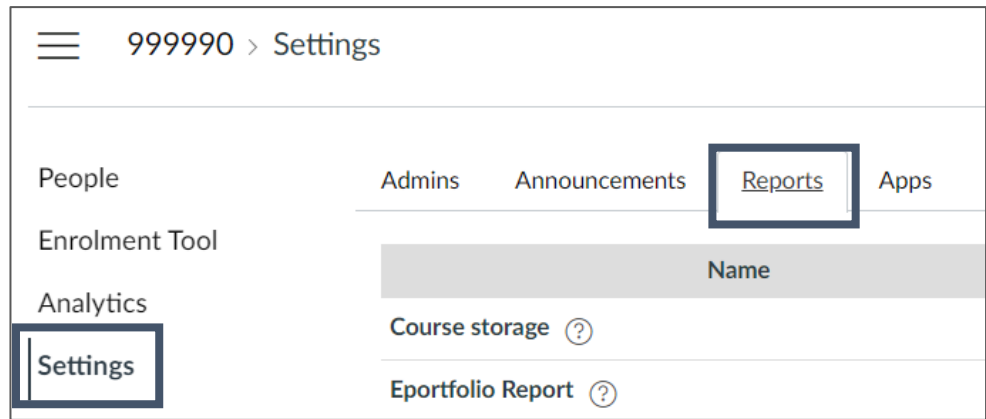
Download the template CSV file. If you have done uploads before, you can modify previously used files.

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 will have two options:

- 1 Add Individual User. This can be a new customer admin, tutor or learner.
- 2 Bulk Add Learners by uploading a CSV file.

## How to create a single user:

1. Click on the **'Add individual user'** tab.
2. Enter the user's first 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 by ticking **'Create as a Customer Admin'** or **'Create as a Tutor'**. 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 by default.
5. Click **'Add User'**.

The screenshot shows the 'User Creation' interface. At the top, there are navigation tabs: 'Purchases', 'User Creation', 'Learners', 'Manage tutors', 'Enrolment Tool Support', and 'Review enrolments'. The main heading is 'User Creation'. Below it are two tabs: 'Add Individual User' (highlighted with a '1') and 'Bulk Add Learners'. The form includes the following fields and options:

- Full name:** A text input field.
- Display name (optional):** A text input field with a note: 'People will see this name in discussions, messages and comments'. It is highlighted with a '2'.
- Sortable name (optional):** A text input field with a note: 'This name appears in sorted lists'.
- Email:** A text input field.
- Notify user via email:** A checked checkbox (highlighted with a '3') with a note: '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:** An unchecked checkbox (highlighted with a '4').
- Create as a Tutor:** An unchecked checkbox (highlighted with a '4'). A note below states: 'If neither Customer Admin or Tutor is checked, the user will be created as a Learner by default.'
- Add User:** A red button (highlighted with a '5') at the bottom.

## How to create multiple learners:

1. Click on the **'Bulk Add Learners'** tab.
2. Download the CSV template (or use a previous one).
3. 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				

4. Upload the file by clicking the **'Upload learner template file'** button.
5. You will see 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.

Below the steps is the 'Recent imports' section, which contains a table with three columns: File, Import time, and Warnings.

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 point to the 'Download learner template file' button, the 'Upload learner template file' button, and the 'warnings.csv' link in the table, respectively.

## How to remove a user from SmartScreen:

1. 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 learners 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
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

2

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

Cancel Save Changes 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

Cancel Save Changes

- 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
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	pendi
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 2 3 4

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 about the decision.



# The Learner Allocation Tab

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

The screenshot shows a web application interface with a navigation menu at the top containing the following tabs: Purchases, User Creation, Product Allocation, Review Enrolments, Learner Allocation, and Enrolment Tool Support. The 'Enrolment Tool Support' tab is selected and highlighted. Below the navigation menu, the page title is 'Enrolment Tool Support'. The form contains the following fields:

- Centre Number**: A single-line text input field.
- Name**: A single-line text input field.
- Email**: A single-line text input field.
- Telephone (optional)**: A single-line text input field.
- SmartScreen User ID (optional)**: A single-line text input field.
- Please describe your issue**: A multi-line text area.

## 6. 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. Below the tabs, the title is 'Licences and Subscriptions' with a subtitle 'Select purchases to assign tutors and learners'. A search bar is present. A table lists two products:

Product Name	SS Code	Product Type	Topic	Licences Available	Start Date	End
<input checked="" type="checkbox"/> 7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles	SS0144-7290EV1-3	Licence	Automotive	89/90	22/01/2024	21/0
<input type="checkbox"/> 6100 Level 2/3 Professional Cookery: Enhanced	SS0129-6100-02	Subscription	Hospitality and Catering	-	22/01/2024	21/0

Below the table are 'Assign Tutors' and 'Assign Learners' buttons. A modal window titled 'Assign Learners' is open on the right, showing the selected product '7290 Level 1 to Level 3 Award in Electric and Hybrid Vehicles'. It includes a search bar, the learner's name 'Charlie Learner', 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 'Assign Learners' button.

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 green notification box 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 two red information boxes: '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...'. The main heading is 'Dashboard'. Below the heading is a dark grey card for the course '7290 Level 1 to Level 3 Award in E...'. A circled '4' is placed over the notification box.

# 7. 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

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 from the list of purchases 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

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'**.

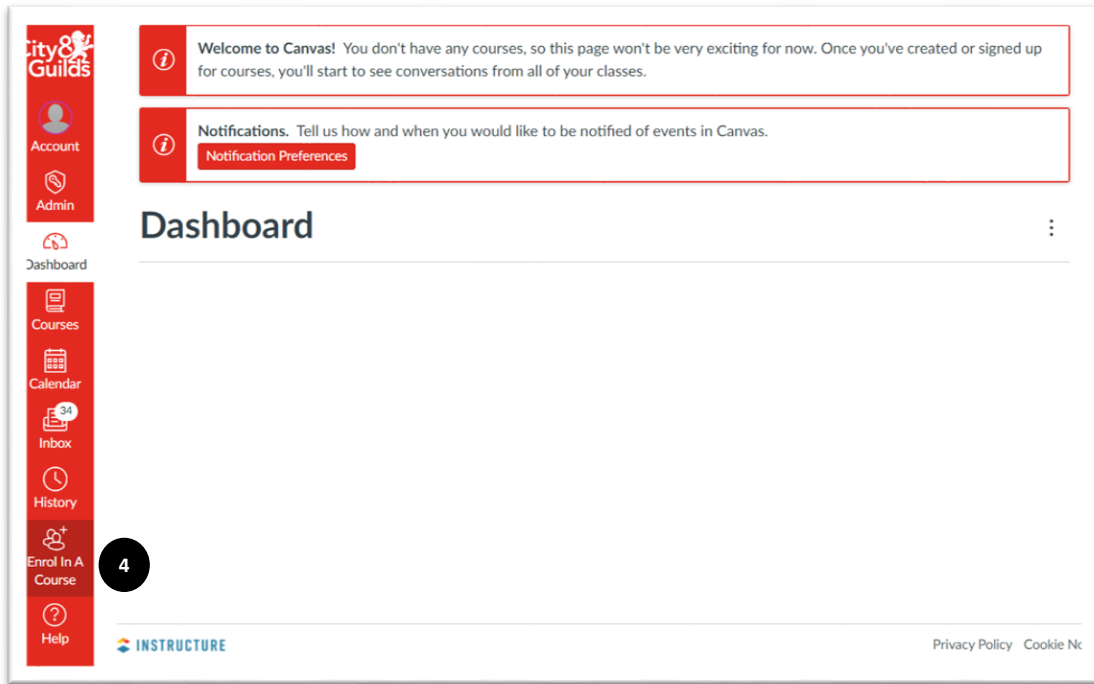
The screenshot shows the 'Licences and Subscriptions' page with a table of products. The '6100 Level 2/3 Professional Cookery: Enhanced' subscription is selected. A modal titled 'Assign Tutors' is open, showing the selected product and a search field for a new tutor. The email 'newtutor@getnada.com' is entered, and 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

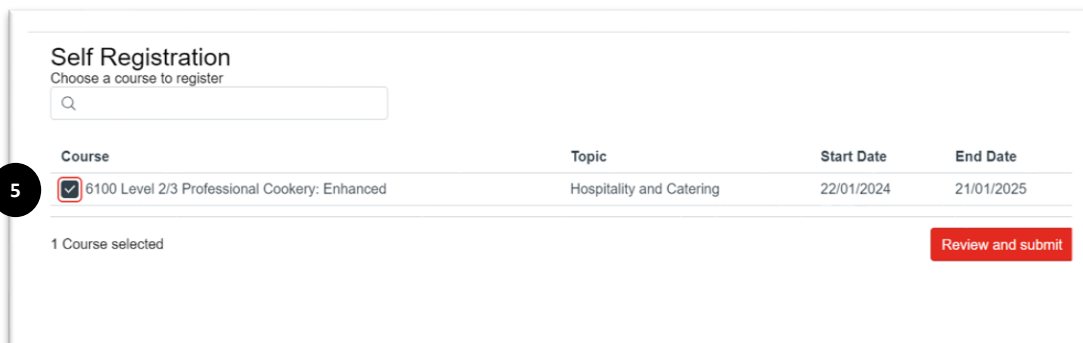
The screenshot shows the same 'Licences and Subscriptions' page. The 'Assign Learners' modal is open, showing the selected product and a search field for a new learner. The name 'Graham Johnson' and email 'graham.johnson@getnada.com' are entered, and the 'Assign Learners' button is highlighted with a 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. The Learner or Tutor now needs to log in and click on **'Enrol in a Course'**.



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



6. Once the Tutor or Learner has accepted the course, the Centre Admin will need 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.

City & Guilds

Account Admin Dashboard Courses Calendar Inbox History Enrol In A Course Help

Notifications. Tell us how and when you want to receive notifications. Notification Preferences

Invitation accepted! Welcome to 6100 Level 2/3 Professional Cookery: Enhanced!

## Dashboard

### Published Courses (1)

6100 Level 2/3 Professional Cook...  
6100 Level 2/3 Professional C...

### Unpublished Courses (0)

No courses to display

7



## 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.

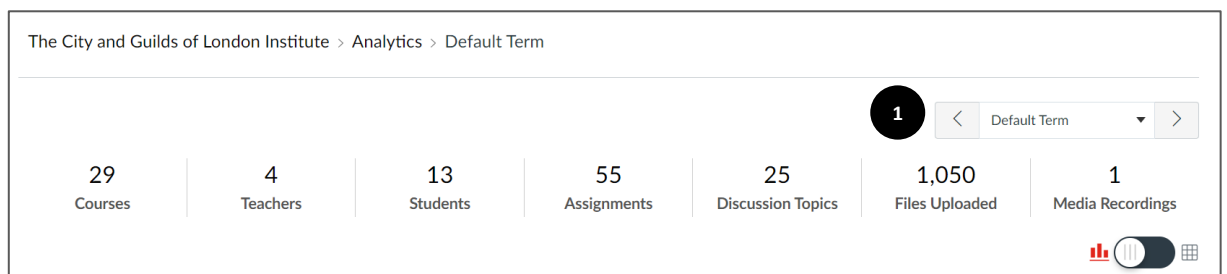
SmartScreen has two reporting options:

- 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.

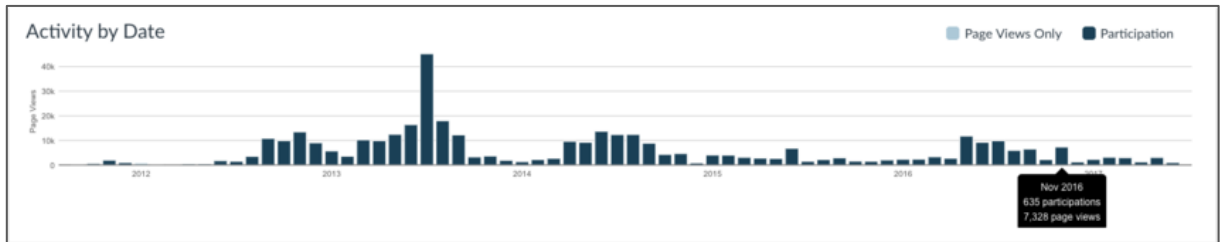


For each term, Analytics includes the following overview:

- **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.

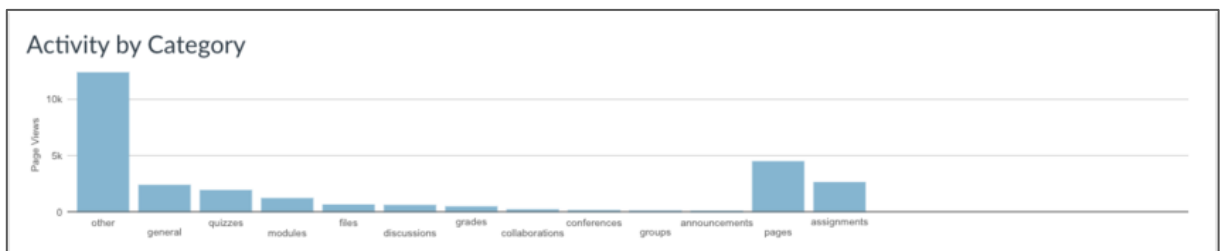


The graph changes the bar display according to the length of time:

- 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.

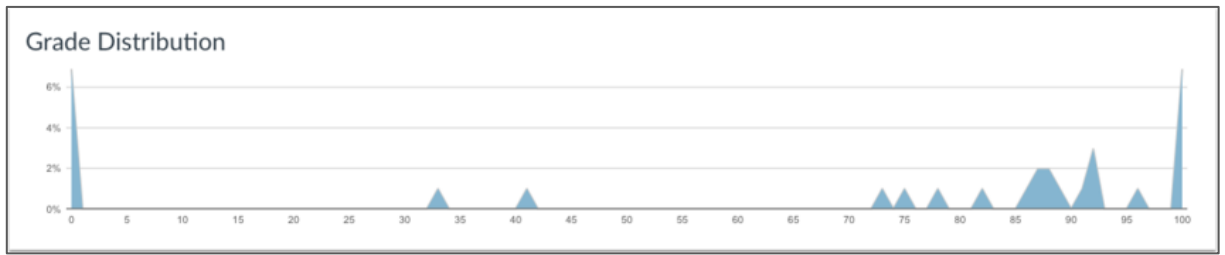
To view the details of the bar graph, hover over the specific bar you want to view. Browser window size, zoom level, and screen resolution may also change how the bars display.

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:

- a) Click on '**Admin**'.
- b) Click on your centre number.
- c) Click on '**Settings**'.
- d) 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.

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.

Name	Last Run	Run Report
Course Storage ?	Never	Configure...
Eportfolio Report ?	Never	Configure...
Grade Export ?	Never	Configure...
LTI Report ?	Never	Configure...
Last Enrollment Activity ?	May 9 at 1:04pm (Term: All Terms) ↓	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.  
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 you to create personal events to track any activity related to SmartScreen content. Tutors can 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 circled '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 scheduled for Wednesday, May 10th. In the top right corner of the calendar view, there is a '+' button circled with a '2'. A small calendar pop-up is visible in the top right corner, showing the month of May 2023 with the 9th and 10th highlighted. Below the calendar grid, there are sections for 'CALENDARS' (listing Jane Smith) and 'UNDATED' (listing Calendar Feed). A 'SmartScreen Help' button is located on the right side of the interface.

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

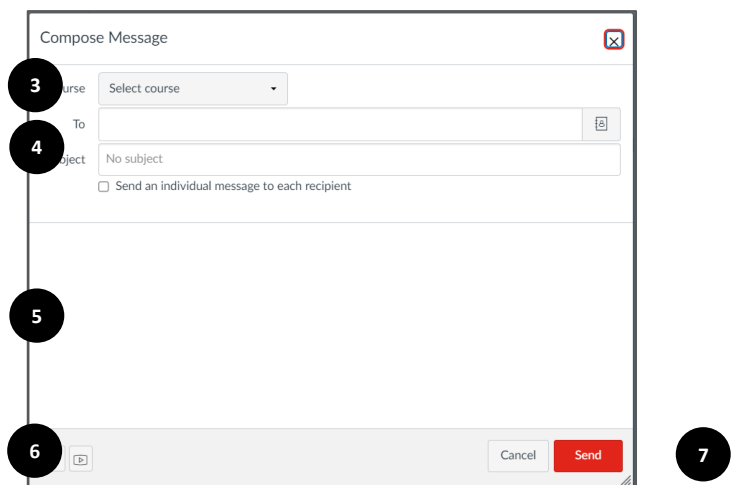
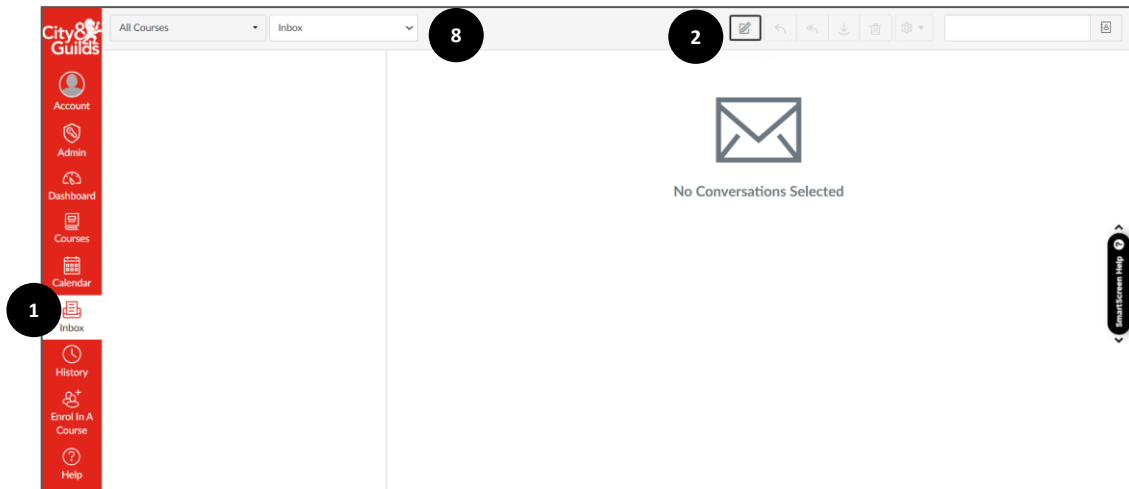
Created events will be visible on the **'Dashboard'**.

### Using the Inbox function

SmartScreen has an internal messaging function. Admins 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 allocation 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](mailto: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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