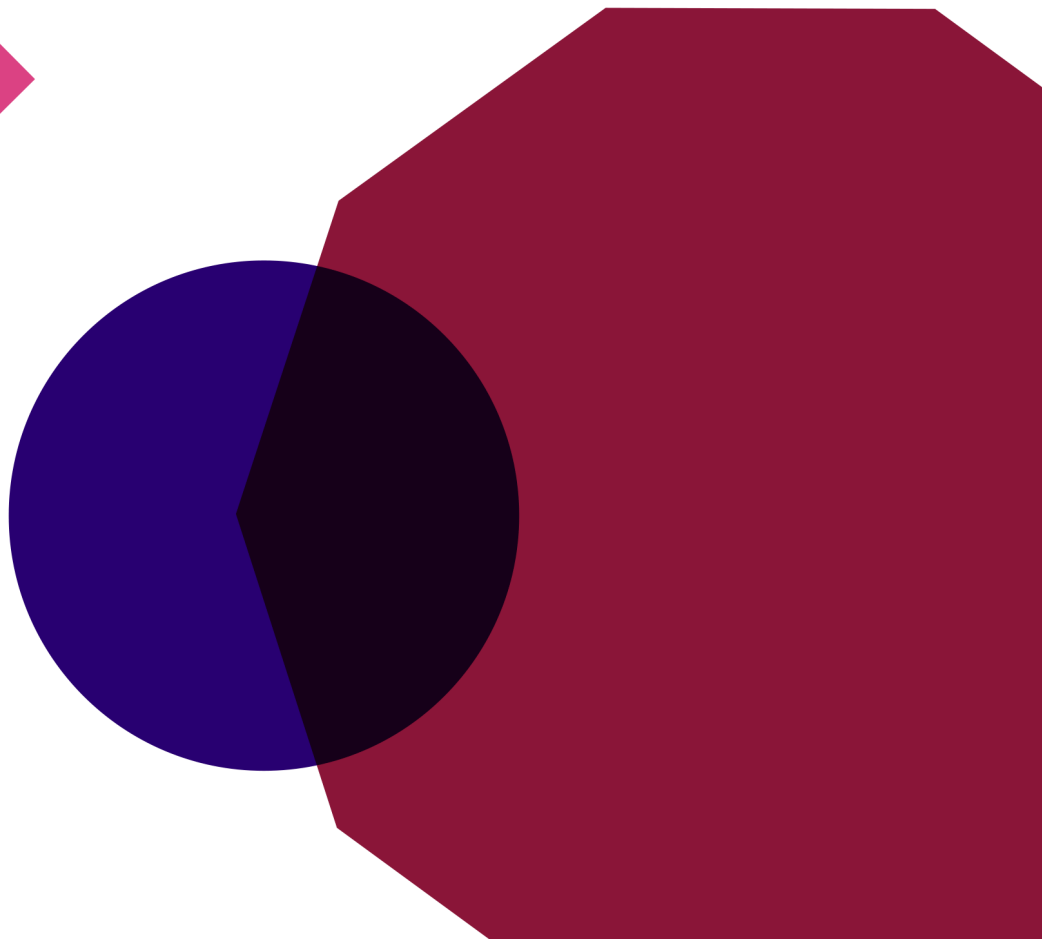


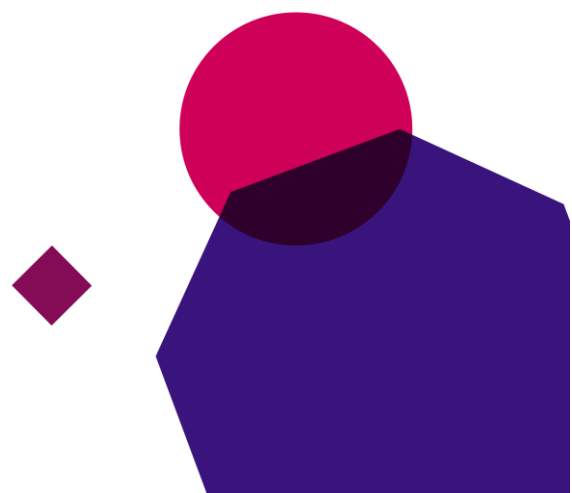
# SmartScreen admin user guide

A guide for people with administration rights for SmartScreen  
For customers and centres using SmartScreen for tutor  
materials, learning resources and our EPA preparation tool



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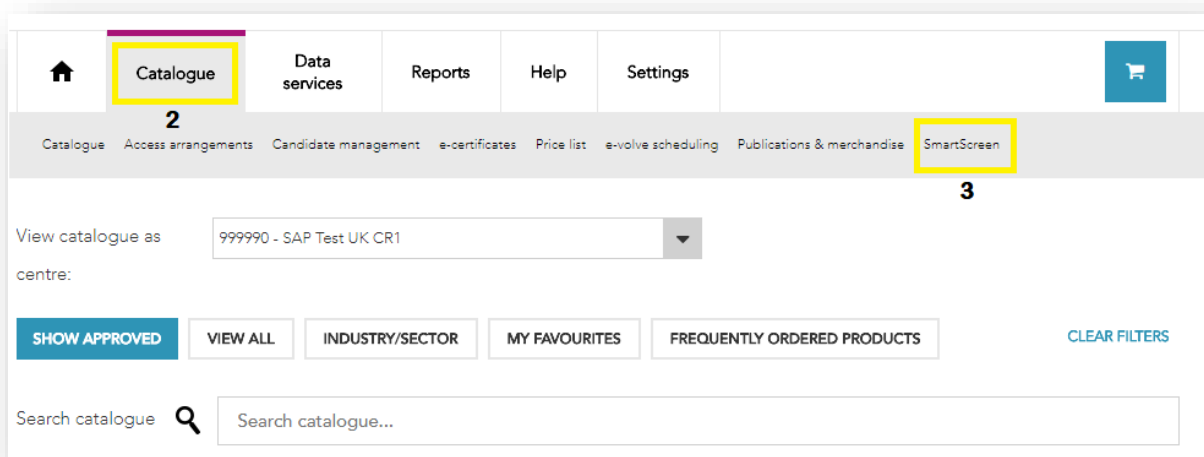
# Ordering SmartScreen products and services

Before you can use teaching and learning materials on SmartScreen, you'll need to buy them on Walled Garden, our secure, online market place. If you don't have access to Walled Garden, a colleague with admin rights can do this for you.

These materials and tools are called SmartScreen subscriptions. This is because, when you buy them, you're also deciding how long you want to use them for.

If you want to access our EPA preparation tool, this is automatically added to your SmartScreen account and doesn't need to be bought on Walled Garden. The EPA preparation tool is for apprentices registered with us for their end-point assessment (EPA) to help them feel more confident for assessment.

1. Login 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 you can enter it in the search box or you can click <Show All>
5. Select the item you want from the list
6. Choose a start date
7. Choose the subscription type:
  - Annual – subscription lasts for a fixed 12-month period
  - Rolling – subscription will automatically renew each year
  - Licence – dedicated subscriptions to a single user account

8. Choose the SmartScreen Administrator for the subscription
9. Type the quantity
10. Click continue

**Search available SmartScreen subscriptions**

Search for SmartScreen products by qualification number, order code, product ID or keyword. When searching on a qualification number or keyword, please use wildcards, for example "3014" and "hair". Click Search.

Select "Show All" to see a list of all SmartScreen products.

Search

**4**

**Search results**

To navigate, use the scroll bar and sort options. You can sort on any of the columns below by clicking on the column heading. To select the SmartScreen subscription, click on the check box, enter the subscription start date, if different from the date shown. Click Continue. Click the help icon for information on the difference between annual and rolling and for your SmartScreen administrator.

Select	Product code	Description	New Subscription Start Date	Subscription Type	SmartScreen Administrator	Qty
<input type="checkbox"/>	SS2730-LV2-NEW	technology have merging skills and is also suitable for preparation for a wider range of jobs in the field of electronic communications. The qualification allows learners to develop and practise the skills required for working with electrical, digital and radio telecommunication systems. It will also cover the basic mathematical knowledge needed to support learners in obtaining technical competency across the various telecommunication system modules.	12.06.2018	Rolling	test accounts	
<input type="checkbox"/>	SS2730-LV3-NEW	SmartScreen Subscription: Telecommunication Systems level 3 (2730)	12.06.2018	Rolling	test accounts	
<input type="checkbox"/>	SS2794L2	SmartScreen Subscription: Level 2 Diploma for Customer Service Practitioners Supports units 201 to 213 and resources include schemes of work, sample lesson plans, PowerPoint presentations and worksheets.	12.06.2018	Rolling	test accounts	
<input checked="" type="checkbox"/>	SS2800-LV1	SmartScreen Subscription: Level 1 Certificate in Engineering	12.06.2018	Rolling	Darren Marks	
<input type="checkbox"/>	SS2800-LV2	SmartScreen Subscription: Level 2 Certificate in Engineering	12.06.2018	Rolling	Darren Marks	
<input type="checkbox"/>	SS2800-LV3	SmartScreen Subscription: Level 3 Certificate in Engineering	12.06.2018	Rolling	Darren Marks	
		SmartScreen Subscription: Level 3 Chef de Partie: Apprenticeship Training Manual This form-fillable pdf version of the training manual is an invaluable supporting resource which will help learners, tutors and employers in understanding what is required of them as part of the on-programme learning. It is the essential practical resource for apprentices and can be saved				

**10**

11. Enter your purchase order number
12. Click <Submit Order>

**Checkout**

Please take a moment to check that your order and delivery address are correct.

If changes are required, click the icon in the Order line items section. If the order is correct, click Submit Order.

**Order reference and delivery**

Please enter your PO / reference number in the Your PO / Ref. text box.

Your PO / Ref.

Deliver to SAP Test U...1A Giltspu...London

Payment method

**Order line items**

To view the details of the Line Items, click in the Detail column. To change the Order Line Item, click in the Amend column. If you have made any changes at this stage, click Update Order. Once complete click Submit Order.

Amend	Detail	Product code	Product description	Order type	Qty	Price	Total	Delete
		SS2800-LV1	SmartScreen Subscription: Level 1 Certificate in Engineering	SmartScreen	1	350.00	350.00	

Order total net	350.00	GBP
Customer discount	-350.00	GBP
VAT/Sales tax	0.00	GBP
Order total	0.00	GBP

**Billing - Account details**

SAP Test UK CR1  
51 1A Giltspur Street,  
London  
Armagh  
EC1A 9DC

If the order is complete, click Submit Order.

The item will be available in the administrator's SmartScreen account within 30 minutes of purchase.

# Registering users

Your tutors, learners or apprentices need to be registered on SmartScreen to access the materials and tools. This is the 'self-registration' process.

As a SmartScreen administrator you can do it in two ways:

- automated – to trigger an email to the learner or tutor inviting them to register
- manually – where you create each individual user account

*We strongly recommend you use the automated process as this is much easier for your tutors and learners.*

## Automated

1. Login to your SmartScreen account
2. Click on <Centre Admin>
3. Click on <Self-registration>
4. Add the email address of the user you wish to create
5. Choose the user type

The screenshot shows the SmartScreen web interface. At the top, the City & Guilds logo is on the left, and the SmartScreen logo is in the center. A navigation bar includes links for MY SUBJECTS, CENTRE ADMIN (highlighted with a yellow box and labeled '2'), CONTENT ADMIN, REPORTS, and LOGOUT. A breadcrumb trail shows 'Home > Centre Admin > Self-registration'. On the left sidebar, 'Self-registration' is highlighted with a yellow box and labeled '3'. The main content area is titled 'Send self-registration emails' and includes a note: 'There are required fields in this form marked \*'. The form contains the following fields and elements:

- 'Email address\*' (labeled '4') with the value 'paul.smith@email.com' and an 'UPLOAD EMAIL ADDRESSES' button.
- 'User types' (labeled '5') with a dropdown menu showing 'Learner'.
- 'Subject' with the value 'Your new SmartScreen Account'.
- 'Body' (labeled '6') with a text area containing a pre-written email template. The template includes a placeholder '%FOLLOWLINK%', instructions for the user to click the link and provide details, and contact information for City & Guilds support.
- 'SEND EMAIL' button (labeled '7') and a 'CANCEL' button.

6. They will be sent the email in box 6. You can change the email text but do NOT change the link (“%FOLLOWLINK%”) as this is what the user needs to register when they receive the email. *The same email goes to all users so if you change it, make sure it makes sense whether they’re a tutor or learner or apprentice.*
7. Click <Send Email>

## Manual

1. Click on <Centre Admin>
2. Click on <Users>
3. Select <Add A New User>

City & Guilds SmartScreen

Home > Centre Admin > Users

**Centre admin**

- Users** 2
- Subscriptions
- Self-registration
- Assign Centre Administrators

**User Administration**

Click the button below to create a new user within your centre.

3 **ADD A NEW USER** **UPLOAD USERS** **BULK REMOVE USERS**

Below are all of the users within your centre. You can amend their data by clicking on the edit icon.

Select pagination value: 50

Search username:

Search cohort:

Search keywords:

**SUBMIT**

**REMOVE SELECTED USERS**

4. Complete the mandatory fields
5. Click Save changes

**User Administration**

There are required fields in this form marked \*.

**General** 4

The username must be a valid email address [the email address will become the username for log in].

Username\*

The password must have at least 8 characters

New password\*  ☐ Unmask

Force password change ☐

First name\*

Surname\*

City/town\*

Select a country\*

Date of Birth ☒ Not Stated

Gender

Candidate Number

Cohort

Keywords

5 **SAVE CHANGES** **CANCEL**

You can also bulk upload users by selecting <Upload Email Addresses> on the Self-Registration page.

1. Select <Upload Email Addresses>
2. Select the Emails.csv template and add the users emails to the excel form.
3. Save the csv document on your computer
4. Select <Choose file> and select your csv document
5. Select <Next> and then select continue.

The image shows a sequence of five numbered steps for bulk uploading users:

- Step 1:** A screenshot of the City Guilds SmartScreen interface. The 'Self-Registration' section is active, and the 'Upload Email Addresses' button is highlighted with a red box and the number 1.
- Step 2:** A screenshot of the 'Emails.csv' template file, highlighted with a yellow box and the number 2.
- Step 3:** A screenshot of an Excel spreadsheet titled 'Emails - Excel'. The spreadsheet contains a column labeled 'email' with two entries: 'manda.ruby@kineo-no-email.com' and 'bobbychin@kineo-no-email.com'. The spreadsheet is highlighted with a yellow box and the number 3.
- Step 4:** A screenshot of a file selection dialog box. The 'Emails' file is selected, and the 'Choose file' button is highlighted with a yellow box and the number 4.
- Step 5:** A screenshot of the 'Next' button, highlighted with a yellow box and the number 5.

## **! IMPORTANT !**

Once you've loaded users by the automated process, they will receive an email from SmartScreen.

The email includes a link, username and password.

Once they've logged in, this effectively completes their registration and you can now assign them the materials and tools (subscriptions) – see page 9.

You cannot assign them to the materials and tools until they have completed this registration.





# Giving your SmartScreen products to tutors and learners

Once you have users (tutors, learners or apprentices) registered on SmartScreen and you've bought the subscriptions (materials and tools) from Walled Garden or have been assigned the EPA preparation tool by us, you'll need to connect the two.

You must give your users access to the products before they can start using them.

1. Click on <Centre Admin>
2. Click on <Subscriptions>
3. Find the product you want and click on <Manage access>
4. Select the user type (Learners, Tutors, Centre Admins)
5. Click <Select Learner> or <Select Tutor>
6. Search for the user scrolling down or use the search function
7. Once the user has been selected click save.

City & Guilds SmartScreen

MY SUBJECTS **CENTRE ADMIN** CONTENT ADMIN REPORTS LOGOUT

Home > Centre Admin > Subscriptions

**Centre admin**

- Users
- Subscriptions** 2
- Self-registration
- Assign Centre Administrators

**Subscriptions**

The subscriptions for 000000 are shown below. You can only manage subscriptions that you have purchased or a Centre Administrator has given you rights to manage.

**BULK ASSIGN PRODUCTS TO USERS**

Product	Date purchased	Date expires	Licenses allocated	Purchased by	Access
3748-02 Functional Skills qualifications in mathematics	10/11/2015	07/11/2018	Unlimited	Ian Smith	<b>Manage access</b> 3
3748-01 Functional Skills qualifications in English	10/11/2015	07/11/2018	Unlimited	Ian Smith	Manage access
4710 Level 4 Diploma in Business and Professional Administration	08/12/2015	05/12/2018	Unlimited	Ian Smith	Manage access
Dental Nursing Forum	04/01/2017	02/01/2019	Unlimited	Ian Smith	Manage access

Contact Us About Us Legal Cookies FAQs

City & Guilds SmartScreen

MY SUBJECTS CENTRE ADMIN **CONTENT ADMIN** REPORTS LOGOUT

Home > Centre Admin > Subscriptions

**Centre admin**

- Users
- Subscriptions** 4
- Self-registration
- Assign Centre Administrators

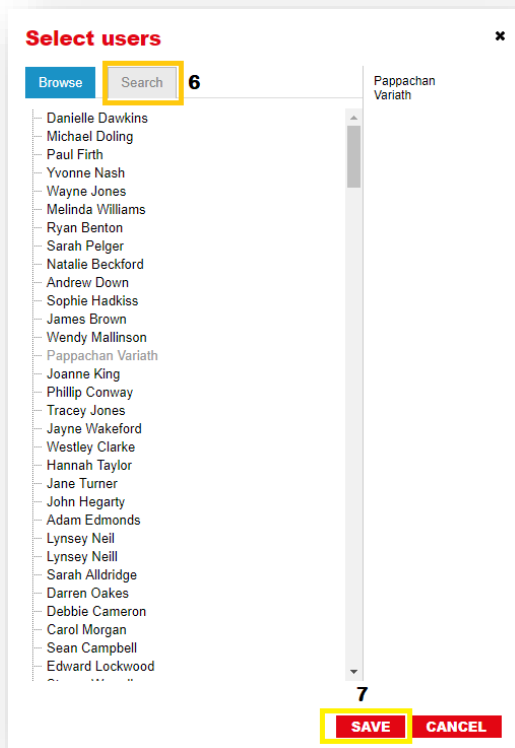
**Subscriptions**

**Learners** Tutors Centre Admins

**Manage Learner Access to 3748-02 Functional Skills qualifications in mathematics**

This product is unlimited. **5**

No license restrictions **SELECT LEARNERS** 0 user(s) awaiting validation



If you want to delete a user from the subscription after adding them, just click <Remove> on the user table.

You can also bulk upload subscriptions to users:

1. Click on <Centre Admin>
2. Click on <Subscriptions>
3. Select the users you want to give access to
4. Click <Next> (Step 2: Products)
5. Select the Subscription(s)
6. Click <Next> (Step 3: Access Level)
7. Select the user access type
8. Click <Next> (Step 4: Preview)
9. Check your selected user and Subscriptions
10. Click <Next> (Step 5: Results)
11. The changes would have been made and a confirmation message will show

## Edit or remove users

You may need to edit a user to update email information or remove them, for example if they're no longer a learner and you want to clean out unnecessary names.

1. Click on <Centre Admin>
2. Click on <Users>
3. Search for the user using the Search username (email address) or by scrolling down the page.

City & Guilds SmartScreen

Home ► Centre Admin ► Users

**Centre admin**

- Users** 2
- Subscriptions
- Self-Registration
- Assign Centre Administrators

**User Administration**

Click the button below to create a new user within your centre.

**ADD A NEW USER** **UPLOAD USERS** **BULK REMOVE USERS**

Below are all of the users within your centre. You can amend their data by clicking on the edit icon.

Select pagination value: 50 ▼

Search username:  3



Search cohort:

Search keywords:

**SUBMIT**

**REMOVE SELECTED USERS**

4. To edit the user select the action icon

ian@test.com		sheffield	GB	54 days		
--------------	--	-----------	----	---------	---	---

5. In edit you can make amendments to the users name, password and email
6. Select <Save changes>

**User Administration**

There are required fields in this form marked \*.

**General**

The username must be a valid email address [the email address will become the username for log in].

The password must have at least 8 characters

☐ Unmask

☐

First name\*

Surname\*

City/town\*

Select a country\*

United Kingdom

Date of Birth

☒ Not Stated

Gender

Candidate Number ?

Cohort

Keywords

**SAVE CHANGES**

**CANCEL**

To remove users, you can tick the box in the remove field or, to remove multiple users, select Bulk Remove Users and complete the csv file and upload.

## To Bulk Remove users using the csv file in the Users section:

1. Select Bulk Remove Users
2. Complete the 'remove\_users.csv document' and save the csv document to your PC
3. Click on choose file and select the saved csv file
4. Click next step
5. Click continue

### 1 User Administration

Click the button below to create a new user within your centre.

ADD A NEW USER

UPLOAD USERS

BULK REMOVE USERS



### User Administration

Step 1: Upload CSV

Step 2: Preview

Step 3: Results

You need to prepare a .csv file for upload. Please click on the link below (remove\_users.csv) to download and save a template file. Edit the file to add an extra row for each user that you want to create.

Each file may only contain users with the same access level and subscriptions.

If this is your first time uploading users to remove or you would like help please read our [Uploading remove users guide](#)

2  [remove\\_users.csv](#)

There are required fields in this form marked \*.

File: (Max size: 1MB)\*

3

Choose file

No file chosen

4

NEXT STEP

# How to check licences

You need a licence for each learner or tutor using SmartScreen. Make sure you have enough licences to cover your cohort ready for the start of the courses. You can easily check the licences remaining.

1. Click on <Centre Admin>
2. Click on <Subscriptions>
3. Locate the licenced subscription and click on View batches
4. The number of licences will show.
5. To add a licence to a user please follow the steps in *Assigning SmartScreen subscriptions to users*

City & Guilds SmartScreen

Home ► Centre Admin ► Subscriptions

**Centre admin**

- Users
- Subscriptions**
- Self-Registration
- Assign Centre Administrators

**Subscriptions**

The subscriptions for 001147 are shown below. You can only manage subscriptions that you have purchased or a Centre Administrator has given you rights to manage.

**BULK ASSIGN PRODUCTS TO USERS**

Product	Date purchased	Date expires	Licenses allocated	Purchased by	Access
6317 TAQA Unit 301 E-learning	27/04/2015	23/07/2018	230 of 230	Ian Smith	<a href="#">View batches</a>
3748-02 Functional Skills qualifications in mathematics	10/11/2015	07/11/2018	Unlimited	Ian Smith	<a href="#">Manage access</a>
3748-01 Functional Skills qualifications in English	10/11/2015	07/11/2018	Unlimited	Ian Smith	<a href="#">Manage access</a>
4710 Level 4 Diploma in Business and Professional Administration	08/12/2015	05/12/2018	Unlimited	Ian Smith	<a href="#">Manage access</a>
Dental Nursing Forum	04/01/2017	02/01/2019	Unlimited	Ian Smith	<a href="#">Manage access</a>

**Licenses allocated**

230 of 230

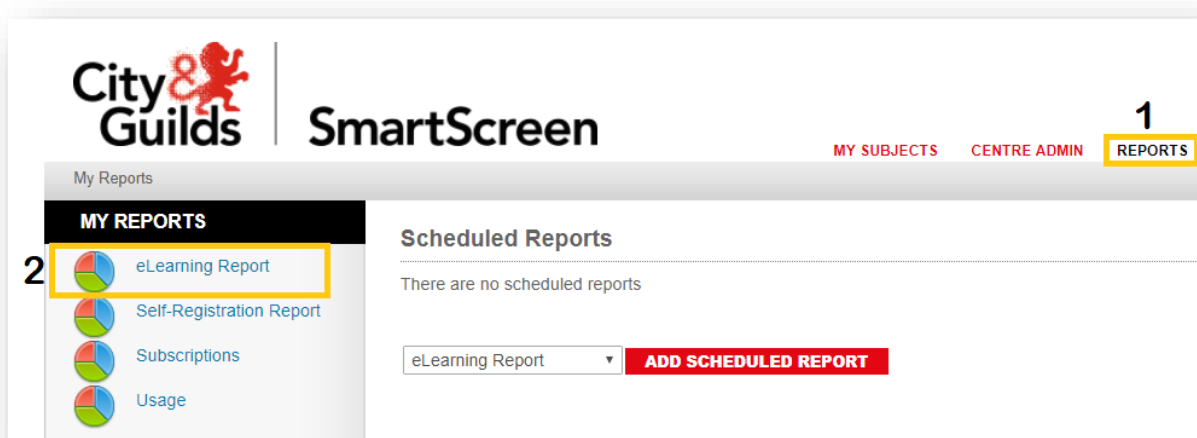
To arrange more licenses, please email [digitalsales@cityandguilds.com](mailto:digitalsales@cityandguilds.com) or call the team on 01924 206709.

# SmartScreen reporting

With SmartScreen not only can you use our learning materials and tools, but you can also monitor how people are using them. This is a great way to see your candidate's activity time and the material they are currently working on or completed. You can also check which of your learners, apprentices and tutors have completed the sign up process with reports on self-registration.

## How to report on e-learning

1. Click on <Reports>
2. Select <eLearning Report> from the My Reports list



The first page of a full report for your Centre will display. You can search the report by:

- User's full name
- Course name
- Course start date
- User's position

You can arrange the report by full name; course name; eLearning title; attempt number; start time, total time; or Status.

Note: A learner's progress status can be Completed / Incomplete or Passed / Failed depending upon how a particular eLearning course is configured.

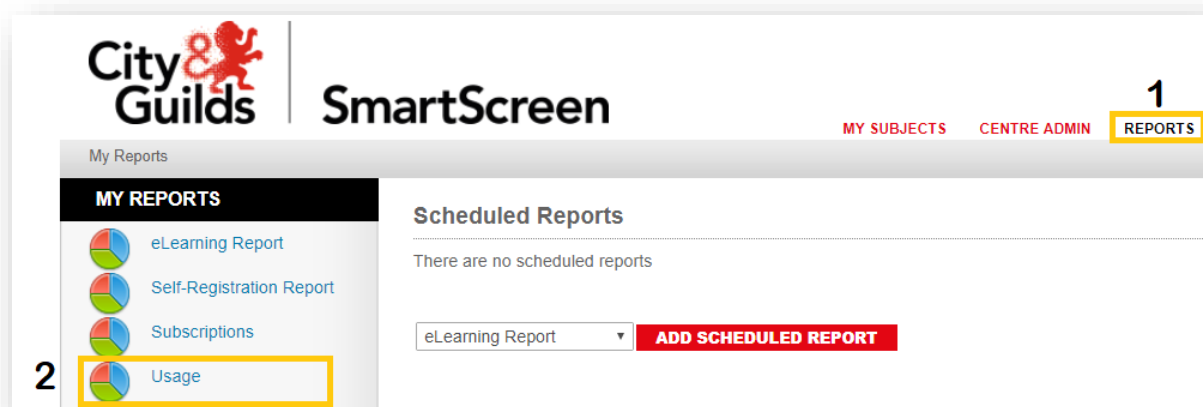
Reports can be exported in Excel, text or ODS format. Select the format from the drop down and select EXPORT

Note: If a course has been configured to show Passed / Failed then a Score may also be available. The default pass mark is 80.

## Checking how your centre uses SmartScreen

This will show all the products you've used, when they were used, who used them, and contact email address for each user. It will help you understand what products are being used more often than others.

1. Click on <Reports>
2. Select <Usage>

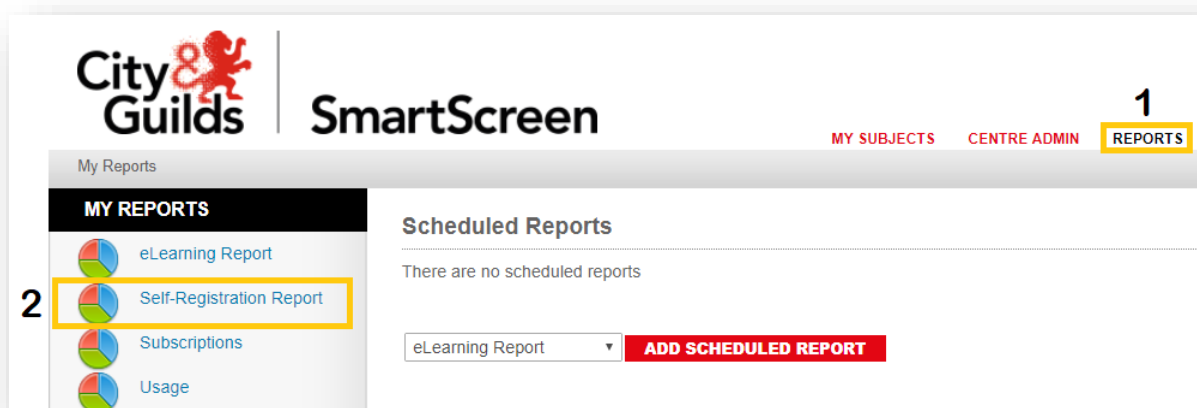


Click on the Export button for the report to be exported into an Excel, Text or ODS format.

## Self-Registration report

The Self-Registration report allows you to see what candidates has completed the self-registration login and allows you to resend this.

1. Click on <Reports>
2. Select <Self-Registration Report>



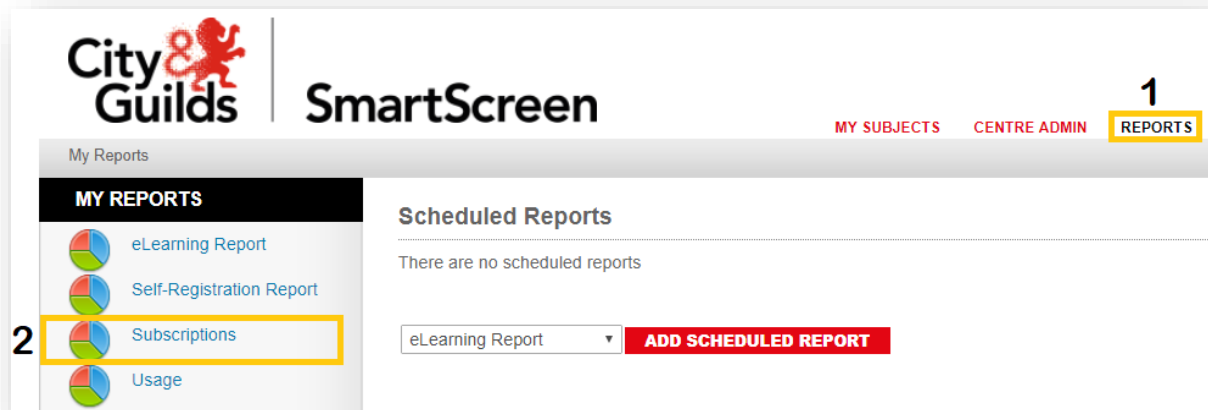
Remember to ask your candidates to check their junk mail if they cannot see the Self-Registration email in their inbox.



## Subscriptions report

The Subscriptions report shows the status of your centres subscriptions and expired subscriptions.

1. Click on <Reports>
2. Select <Subscriptions>



If you would like to order new subscriptions or renew your old ones please refer to page 1

## Here to help

If you have a question not answered here, don't forget that we have a SmartScreen team to support you.

Is something missing from this document? Please email us with your suggestions so we can keep making it better for you.

Email [smartscreen@cityandguilds.com](mailto:smartscreen@cityandguilds.com) or call our Customer Service team on 0844 543 0000 (calls cost 7p per minute plus your phone company's access charge).

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England & Wales (312832) and Scotland (SC039576).  
1 Giltspur Street, London EC1A 9DD.  
T +44 (0)20 7294 2468  
F +44 (0)20 7294 2400  
[cityandguilds.com](http://cityandguilds.com)

