SmartScreen

SmartScreen (powered by Canvas)

User Guide for Customer Admins

Version 3.0

Last modified 24 June 25

For external use

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Document revision history

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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 the Walled Garden, managing licenses and subscriptions for 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
• Chrome 107 and 108 (preferred) • Firefox 106 and 107 • Edge 106 and 107 • Respondus Lockdown Browser • Safari 15 and 16	The latest version of Safari (iOS) and Chrome (Android)

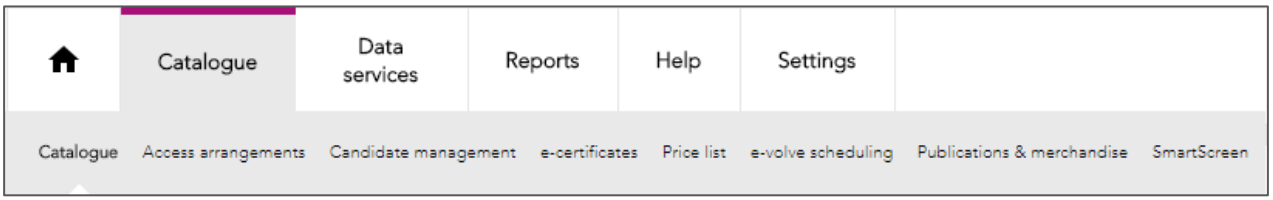
2. Order SmartScreen Products

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
2. Select **'Catalogue'.**
3. Select **'SmartScreen'.**

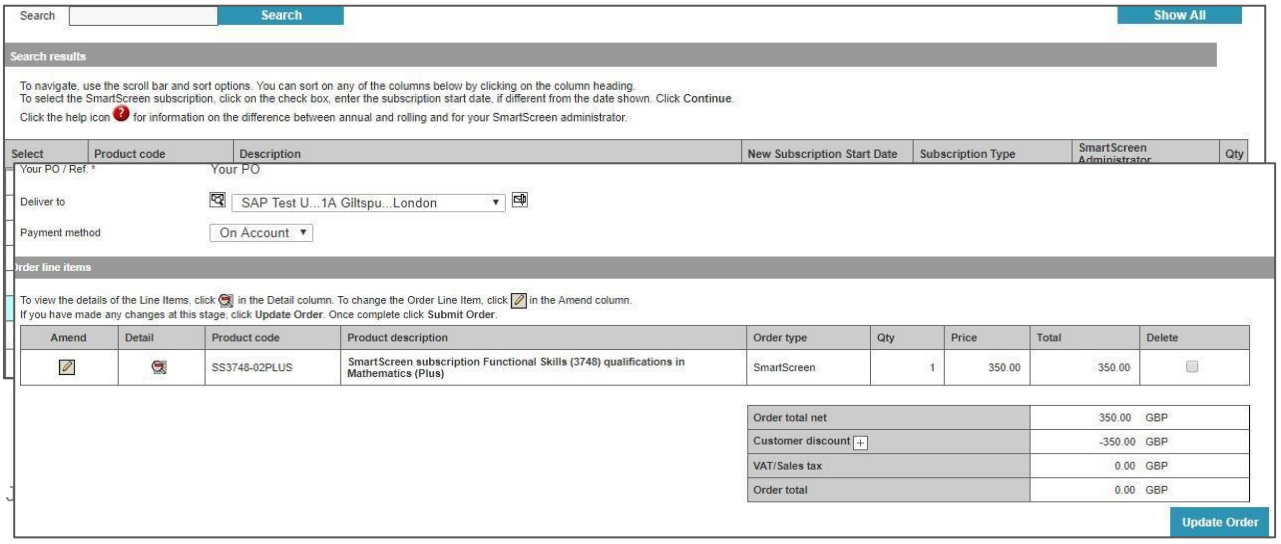


4. If you know the SmartScreen code, type it in the search box and click **'Show All'.**
5. Select the item you want from the list.
6. Choose a start date.
7.
   a. If purchasing a subscription, choose the type:

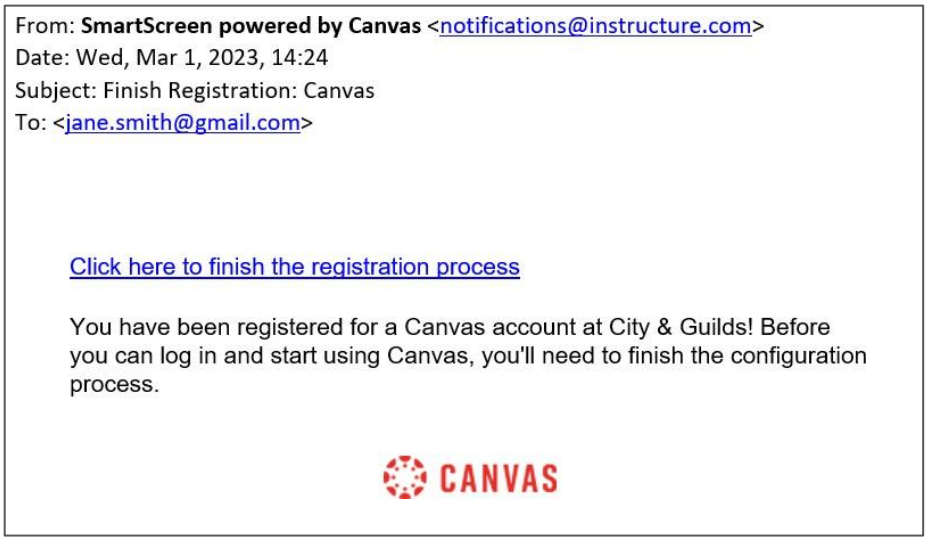
   – Annual – subscription lasts for a fixed 12-month period
   – Rolling – subscription will automatically renew each year

   – 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'.**



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 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.


From: **SmartScreen powered by Canvas** <notifications@instructure.com>
Date: Wed, Mar 1, 2023, 14:24
Subject: Finish Registration: Canvas
To: <jane.smith@gmail.com>

Click here to finish the registration process

You have been registered for a Canvas account at City & Guilds! Before you can log in and start using Canvas, you'll need to finish the configuration process.

CANVAS

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

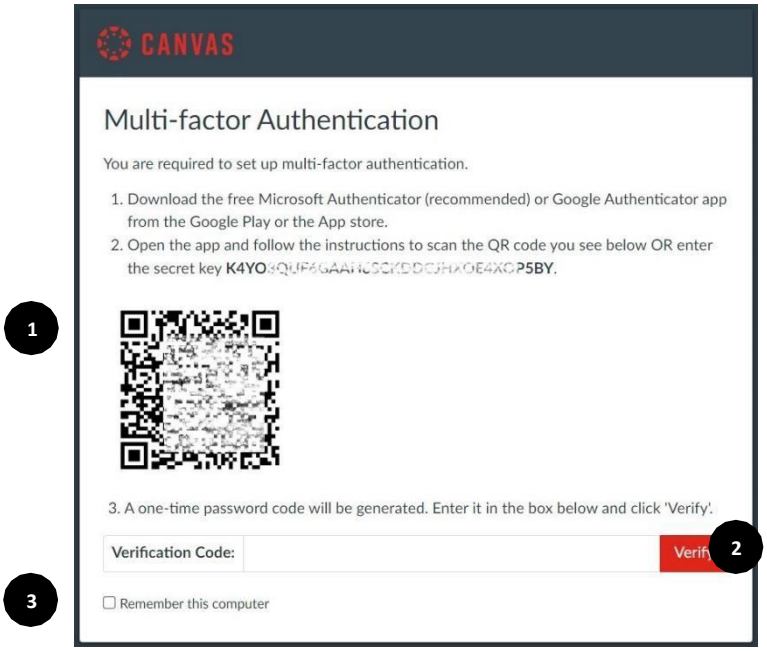
14. The item will be available in your SmartScreen account within 60 minutes of purchase.

3. Login and set up your SmartScreen profile

Account login:

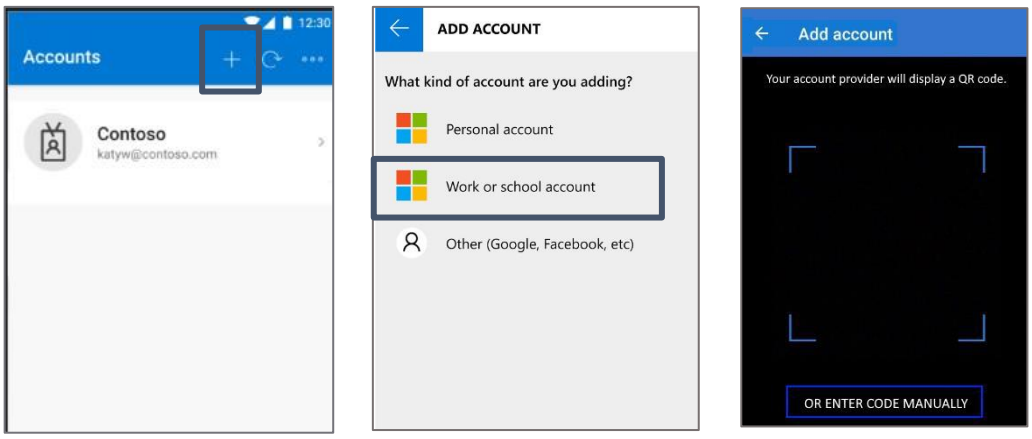
1. Access SmartScreen via this link.
2. Enter your email address and password. If you have forgotten your password, please use the **'Forgot Password?'** link.

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**.



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:



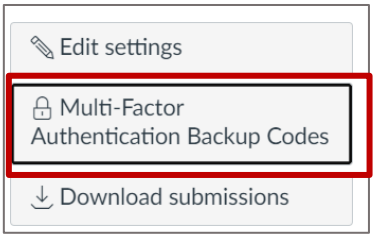
- Click on '**+**' button.
- Click on the '**Other (Google, Facebook, etc.)**' button.
- The App will launch a QR code scanner or you will be able to enter secret key manually.

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

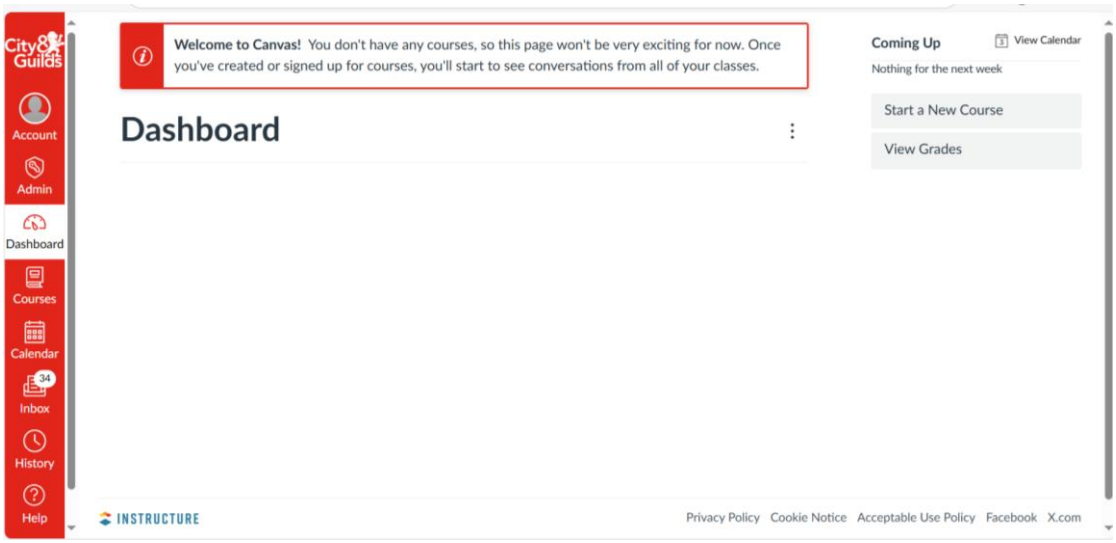
3 If you want multi-factor authentication to remember the computer you are using to log in to SmartScreen, click the '**Remember this computer**' checkbox.

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

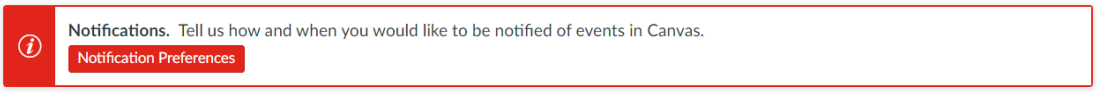
- Access your '**Account**' > '**Settings**' menu.
- Click on '**Multi-Factor Authentication Backup Codes**'.
- 10 backup codes will be generated.



4. After login you will be redirected to the '**Dashboard'** page. Tutors and learners that have been assigned packages will see them there. As a Customer Admin, you will not see any packages on your dashboard.

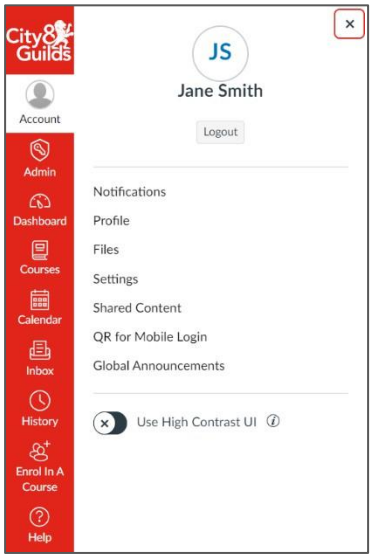


5. You can update your notifications preferences by clicking the '**Notification Preferences**' button on the banner on the '**Dashboard**' or via the '**Account**' menu.



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:



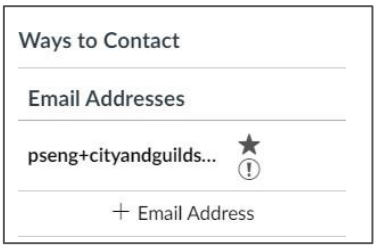
- **Notifications** – update notifications preferences for SmartScreen.
- **Profile** – upload your picture or update your name.
- **Files** – function to upload with store and view your personal files.
- **Settings** – update your time zone, add an additional email address or change accessibility settings.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

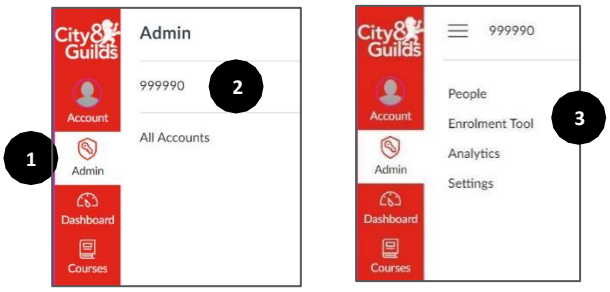
You will have access to the following options in the '**Admin**' menu:

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 5** for detailed instructions.
3. **Analytics** – provides usage statistics. Please see **Section 6** 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 6** for detailed instructions
   d. **Apps** – list of apps / plug-ins. Currently, external apps cannot be configured for your organisation.

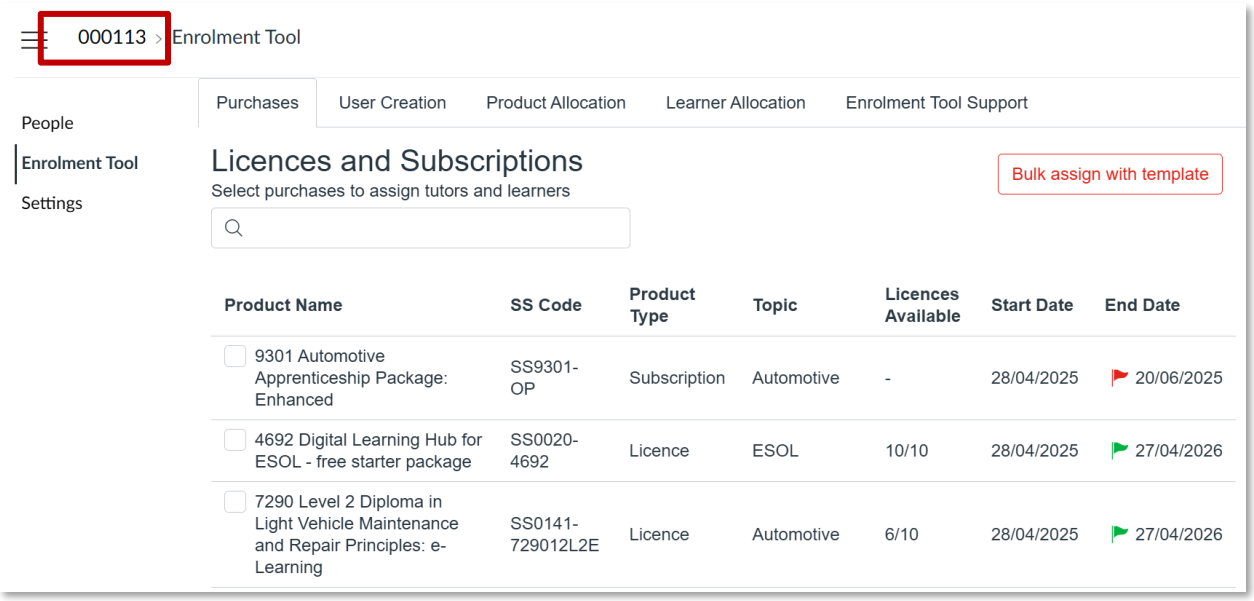
5. Overview of the Enrolment Tool

The '**Enrolment Tool**' is where Customer Admins and Tutors can add Learners and other 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

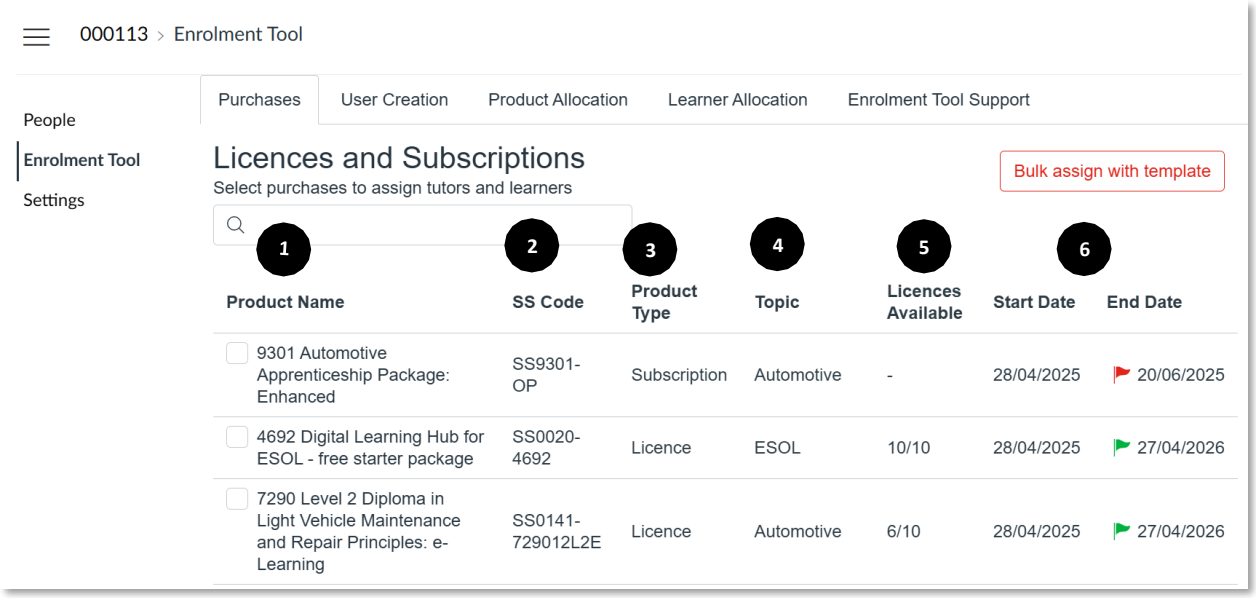


1. Click on the **'Admin'** menu.
2. Click on your **Centre Number** (in the above example that is 000113).
3. Click on the '**Enrolment Tool'** to access a version of the screenshot below.



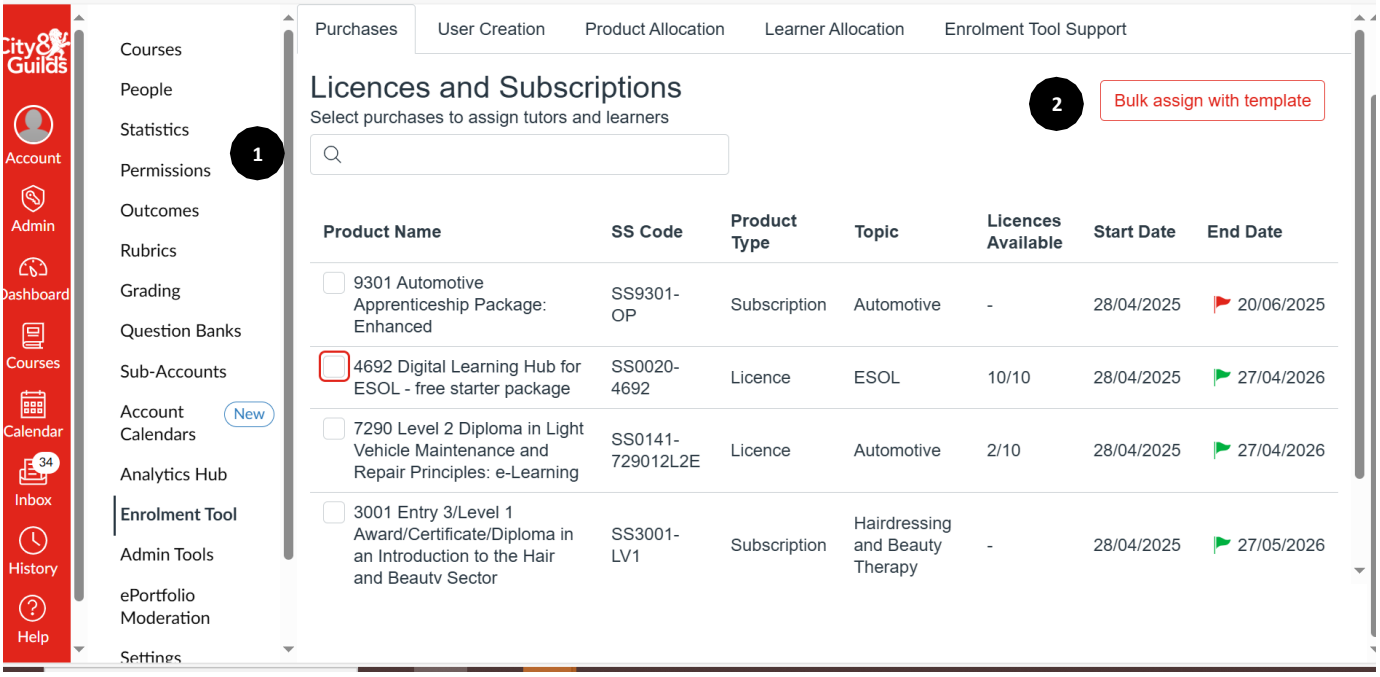
The Purchases Tab

The '**Purchases**' **tab** shows all your SmartScreen resources. You can assign products to your Learners and Tutors via this tab.



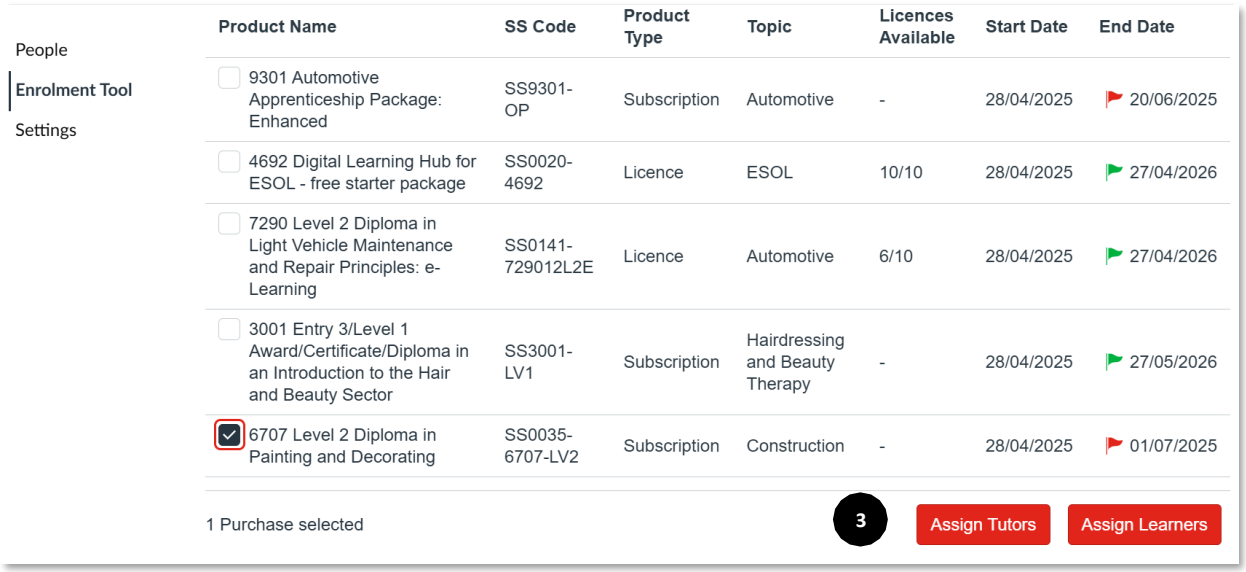
This tab allows you to view:

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.



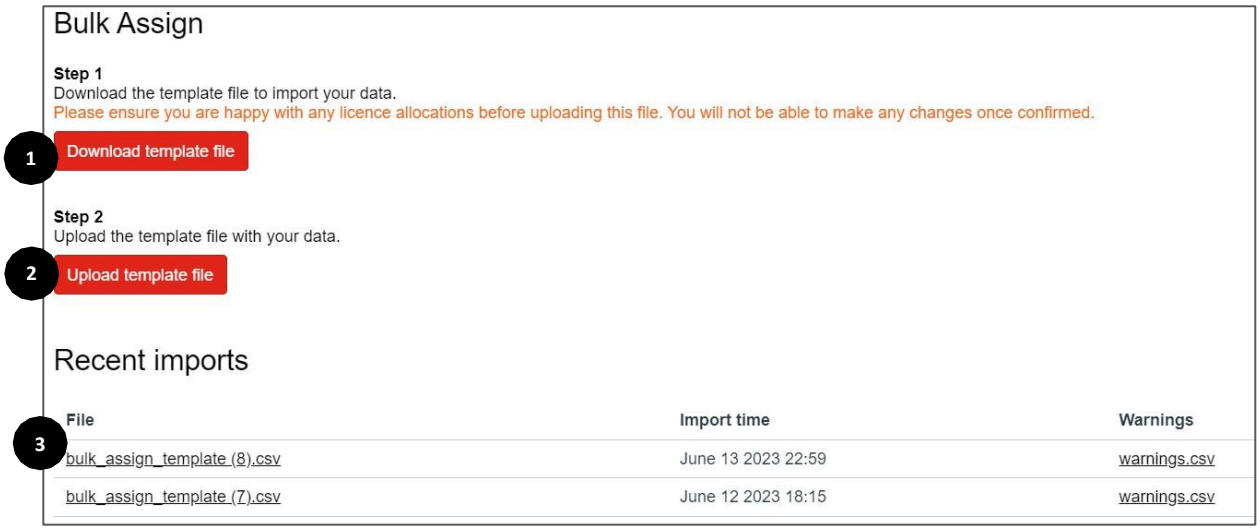
1 You can use Search to find your required package. You can search by Product Name, Product Type, or Topic.

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**'.

Bulk assign products



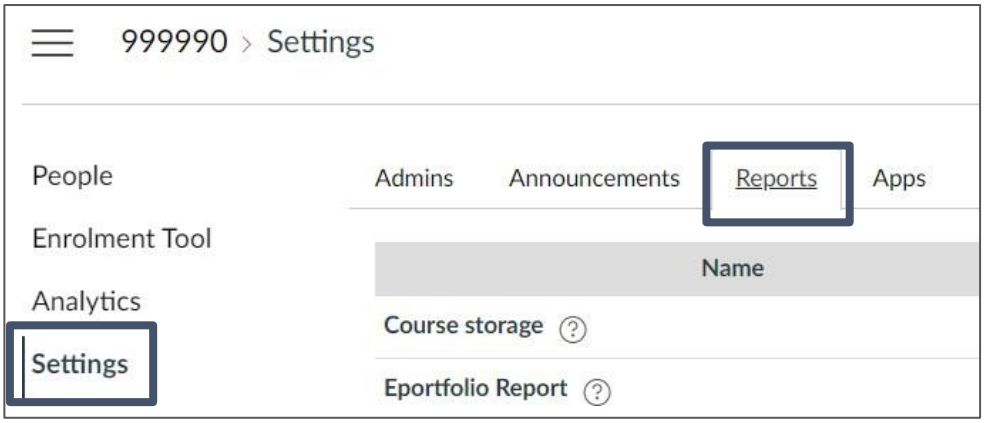
1 Download the template CSV file. If you have done uploads before, you can modify previously used files.

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.

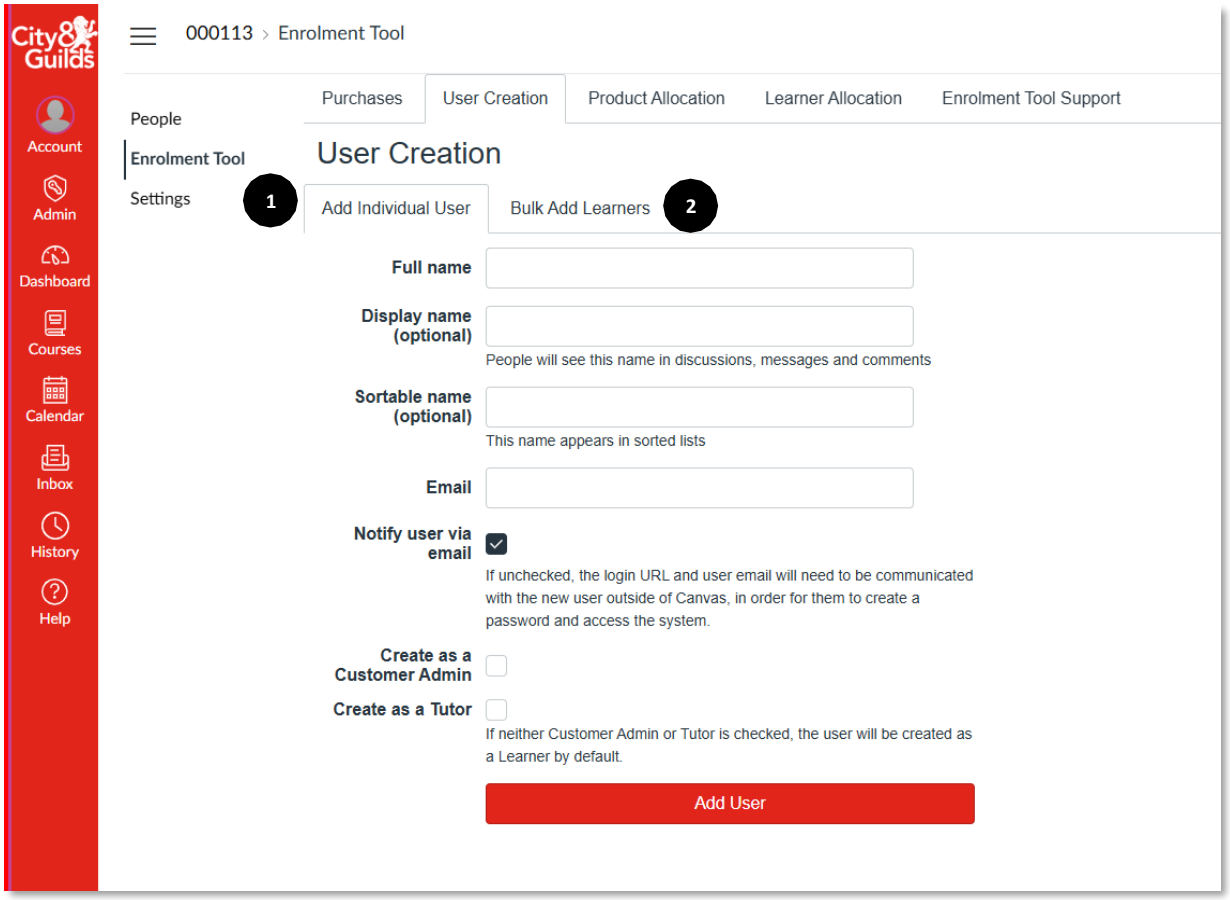
2. Upload the file by clicking the '**Upload template file**' button.

   - For licensed and subscription products – Learners will be enrolled and will see the product appear on their '**Dashboard**'.

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**'.

The User Creation Tab

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



How to create new SmartScreen users:

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

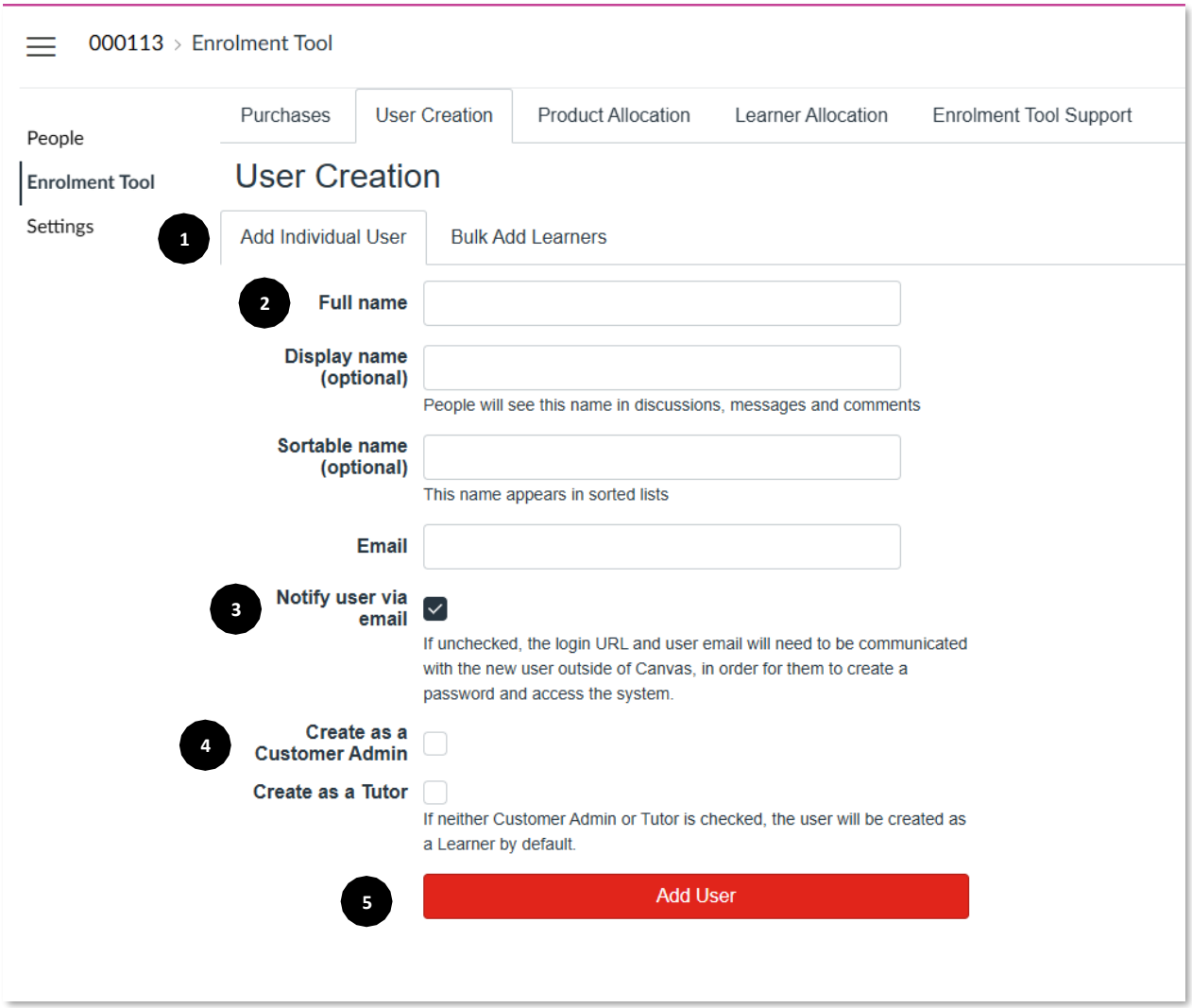
You will have two options:

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**'.

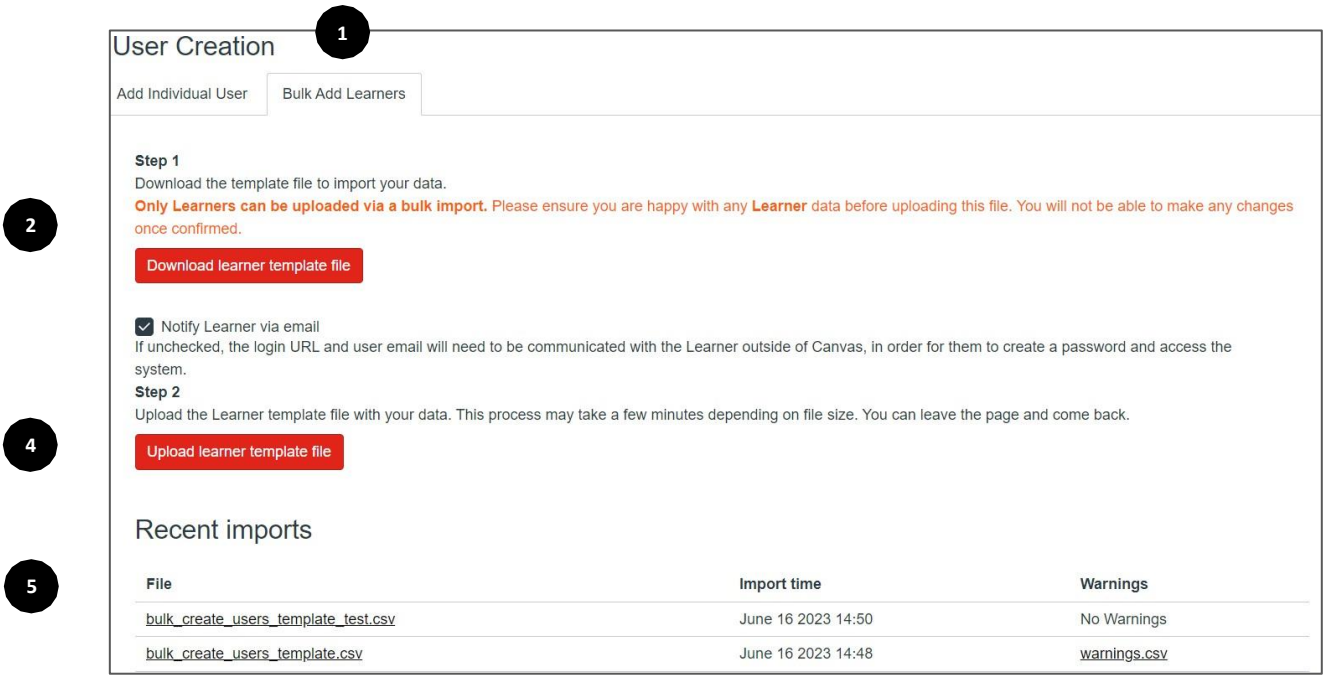


How to create multiple Learners:

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



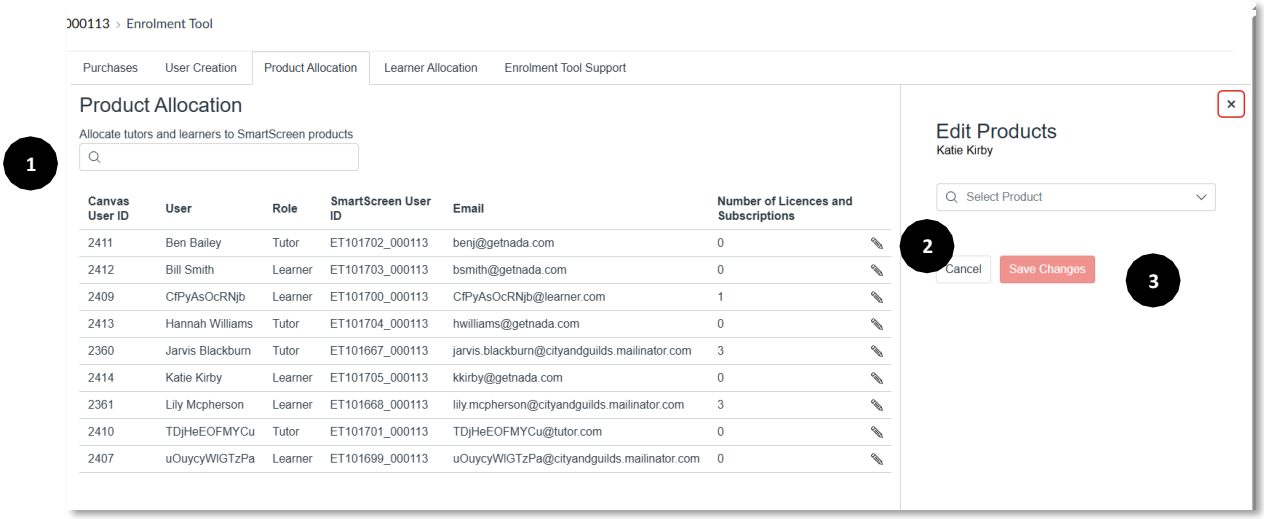
How to remove a user from SmartScreen:

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 or call the team on 01924 206709.

The Product Allocation Tab

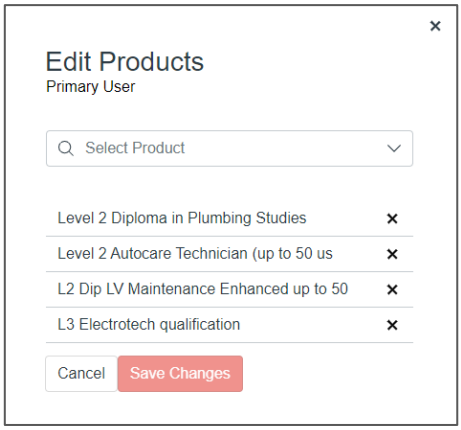
The '**Product Allocation**' tab allows you to allocate Tutors and Learners to the products you have purchased.

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.



3. Once you have selected the product for the Tutor or Learner in question, click '**Save changes**'.

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

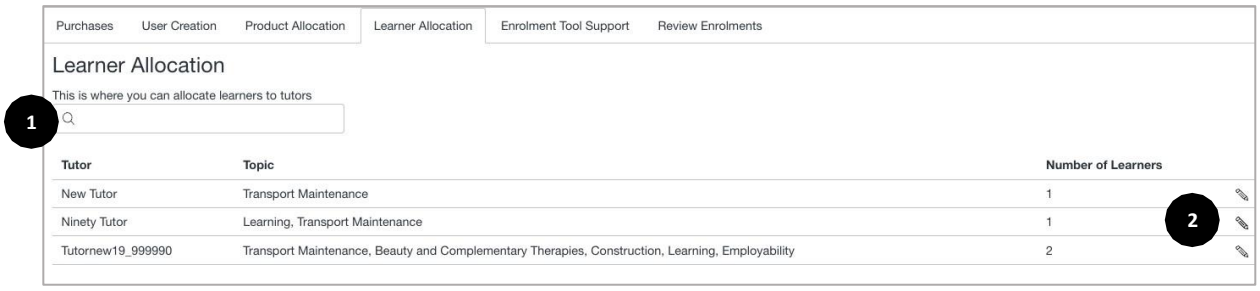


- To add a licence or subscription to a Learner, select the product in the '**Select Product**' drop-down and then click '**Save Changes**'.
- To remove the licence or subscription click on the '**x**' button and then click '**Save Changes**

The Learner Allocation Tab

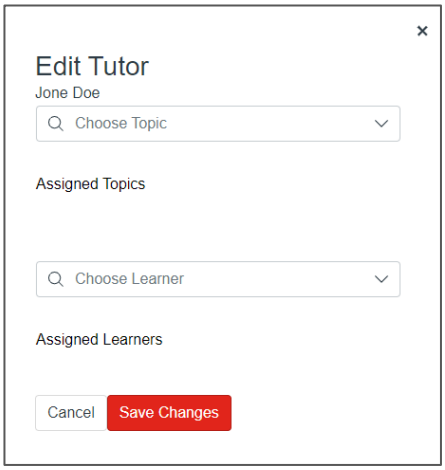
The '**Learner Allocation**' tab will allow you to assign topics and Learners to your Tutors.

- Tutors will be automatically assigned to all packages on which their Learners are enrolled.
- Tutors will only be able to see products assigned to them in the enrolment tool.



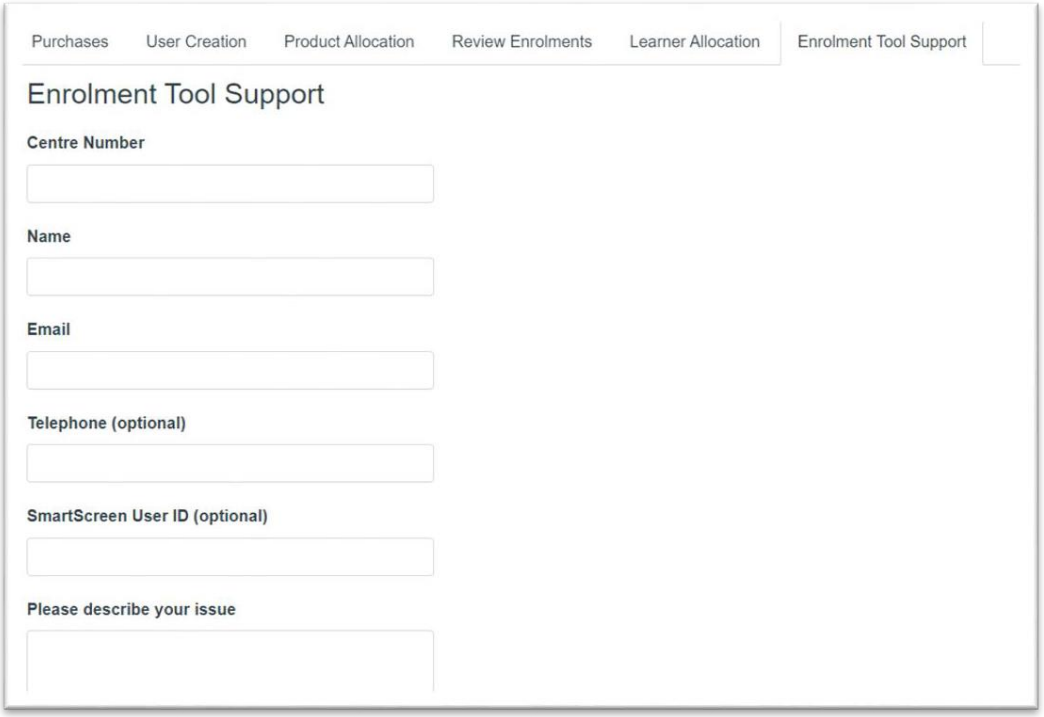
1. Use the search function to find the relevant Tutor.
2. Click on the pen icon to open the editing menu.

Important note: the same Learner cannot be assigned to more than one Tutor for the same topic.



- 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 team or fill in a short form on the '**Enrolment tool support**' tab.



6. 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.

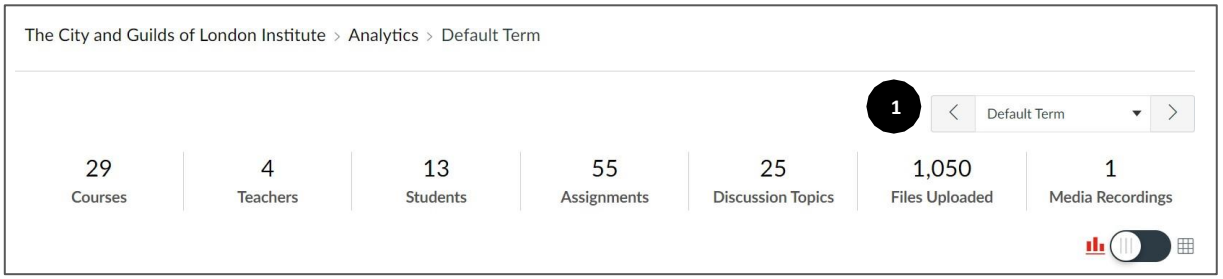
SmartScreen has two reporting options:

- 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.

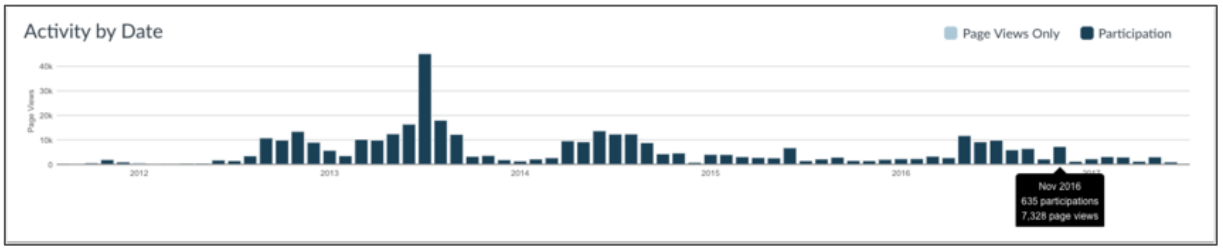


For each term, Analytics includes the following overview:

- **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.

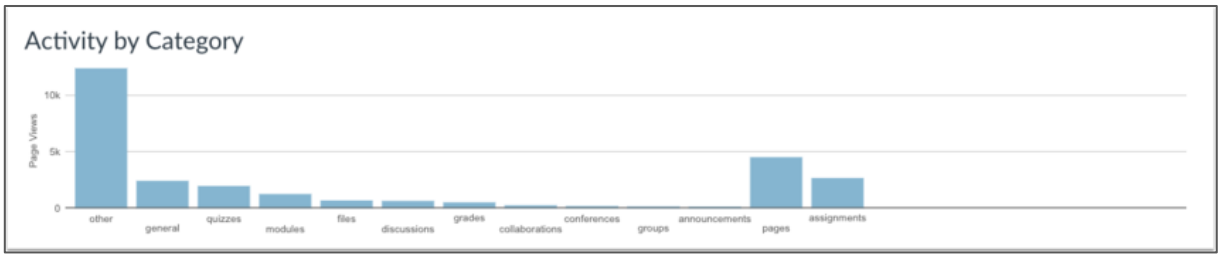


The graph changes the bar display according to the length of time:

- 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.

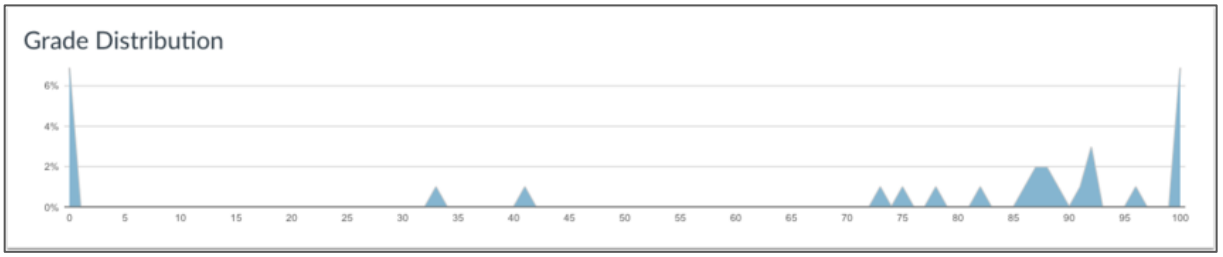
To view the details of the bar graph, hover over the specific bar you want to view. Browser window size, zoom level, and screen resolution may also change how the bars display.

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:

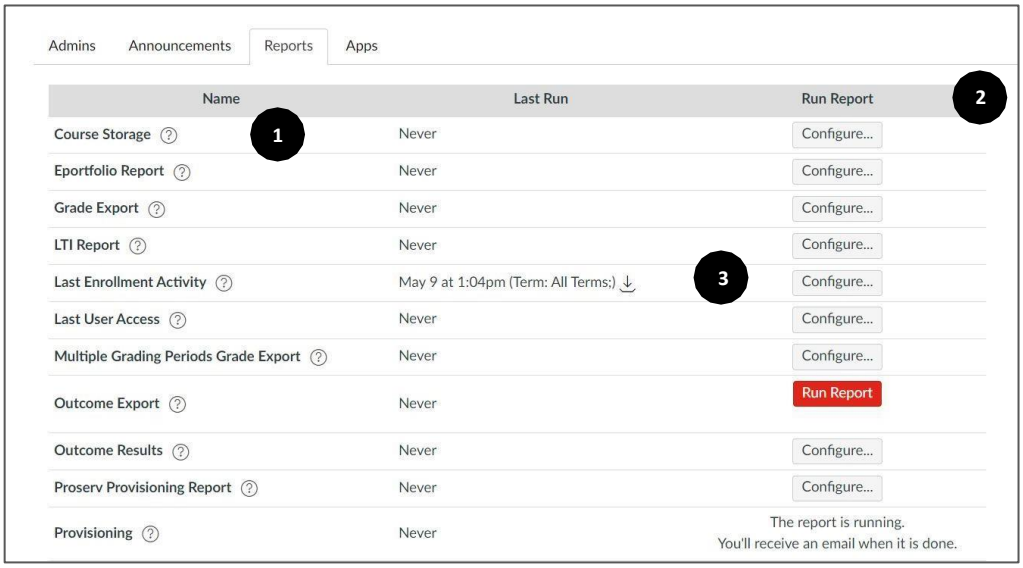
a) Click on '**Admin**'.
b) Click on your centre number.
c) Click on '**Settings**'.
d) Click on the '**Reports**' tab.

1 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.



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, Admina, 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.

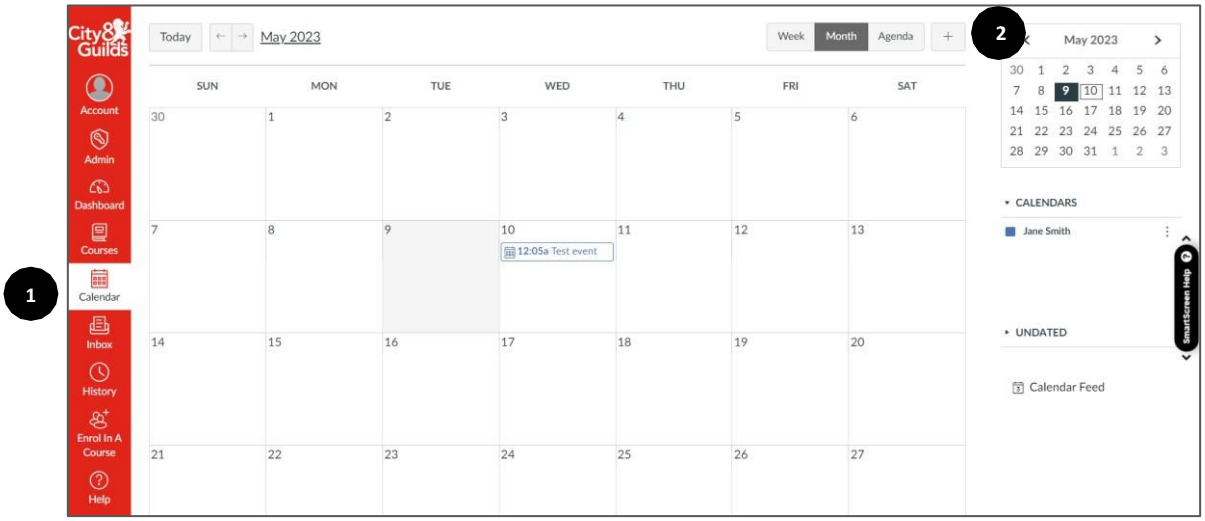
6. **Zero Activity** – this report shows all the learners enrolled in any course. The resulting CSV file will have one row for all learners that have not visited the course in the dates you are searching for.

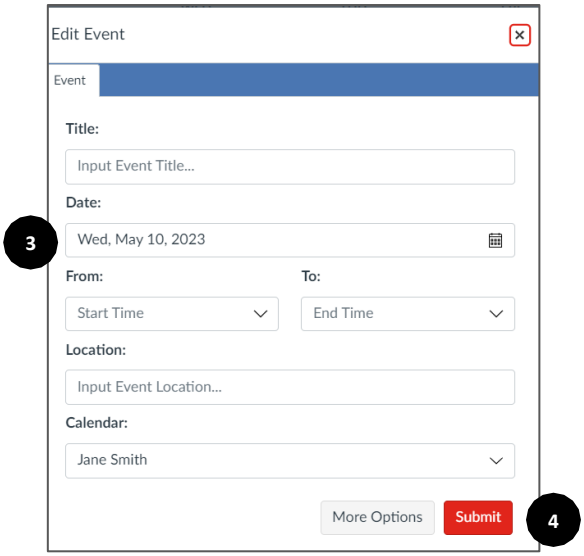
Using the Calendar function

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**'.





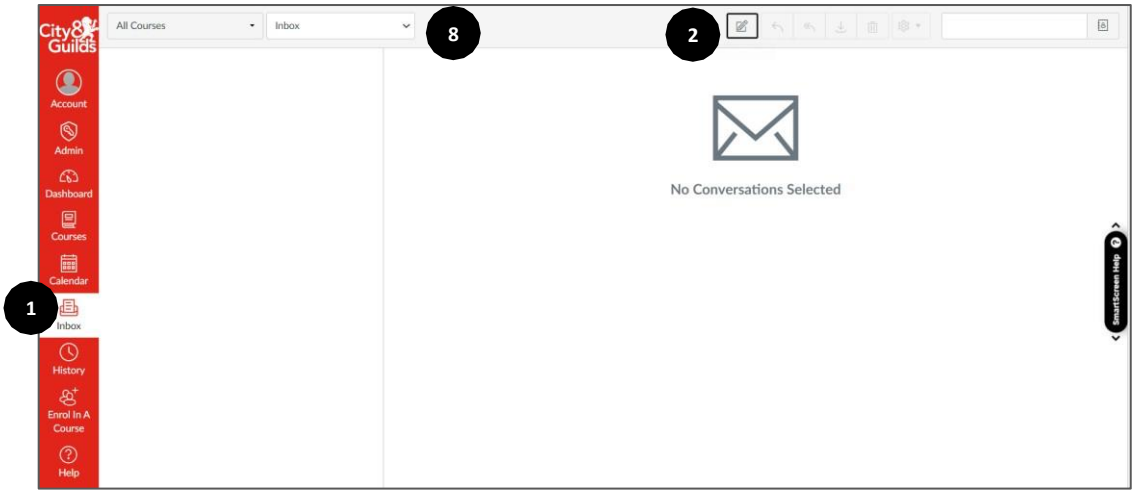
Created events will be visible on the '**Dashboard**'.

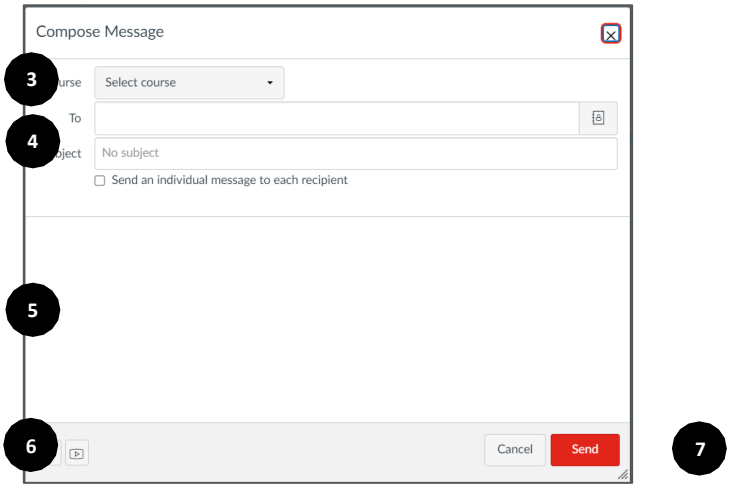
Using the Inbox function

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[CE1].





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 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	✓	✓	✗

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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www.cityandguilds.com

About City & Guilds

City & Guilds is the global skills partner, empowering people, organisations and economies to develop the skills they need for growth. With almost 150 years of trusted expertise, we support people into work, help them develop on the job and move into the next job.

We work with Governments, employers, training providers, colleges and industry stakeholders to design and deliver high-quality training, qualifications, assessments and credentials that lead to meaningful career progression. We understand the life changing link between skills development, social mobility and success. Our solutions span critical sectors including construction, engineering, transport, energy and electrical, serving over 1 million learners annually.

Through our comprehensive portfolio of brands and trusted global network, we set industry-wide standards for technical, behavioural and commercial skills to improve performance and productivity. We believe you can achieve your potential - and we're here to help make it happen.

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