

Welcome to new and improved SkillsPass Training Delivery Suite!

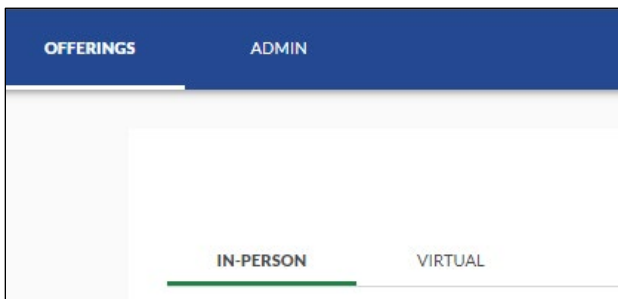
Before we get started, let's make sure you are using a supported browser. Chrome, Firefox, Edge, and Safari are a-ok. If you are trying to use Internet Explorer, prepare to be frustrated. It is enjoying a well-earned retirement.

Have you been here before? If you have, maybe you're interested in heading to the good parts:

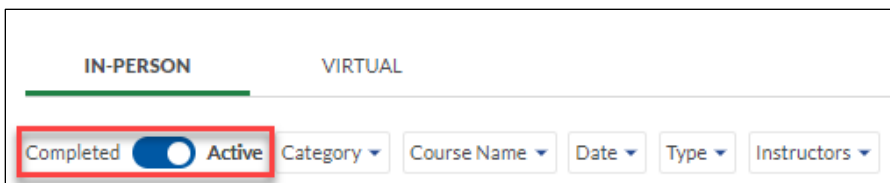
- [Add Offering](#) – In order to provide training, you need training to provide.
- [Manage Seats](#) – If you offer training, they will come.
- [Update Class Record](#) – Be the Oprah of awarding certificates.
- [Edit Offering](#) – You might not be able to make change for \$20 but you can for an offering.
- [Admin](#) – Still can't make change for a \$20 but now you can change a learner's information.
 - [Update](#)
 - [Merge](#)
- [Reporting](#) – You must be a DJ with access to so many records!
- [Help](#) – Even if your last name isn't McCartney, we'd be happy to help.

Overview

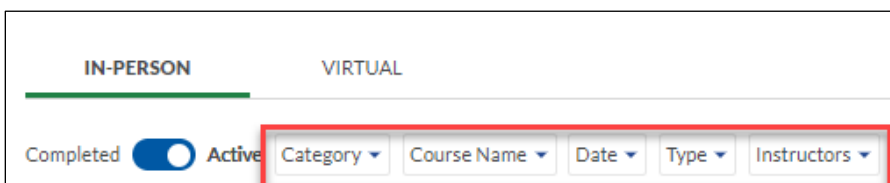
When you sign in, you will be brought to the Offerings page. The default setting is active In-Person offerings. To switch to virtual offerings, click Virtual. We're not trying to trick you here.



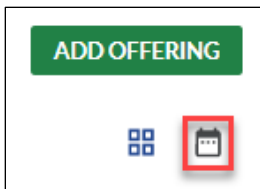
Active offerings are offerings that are upcoming or where the class record hasn't been updated yet. To switch to completed offerings, select the toggle to switch.



You can narrow your search by using the filters.



If you would like to locate training from a specific date, you can use the date filter or switch to calendar view.



Add Offering

The first step couldn't be easier. Once you sign into your training provider profile, click on the green Add Offering button.



Select the course from the drop-down menu. In-Person and Virtual will be indicated to the right of the course name. For this example, we will choose Virtual.

Add Offering

Communication Skills for Frontline Employees - Level I DEMO	Virtual
Communication Skills for Frontline Employees - Level I DEMO	In-Person
Communication Skills for Frontline Employees - Level II DEMO	In-Person
Communication Skills for Frontline Employees - Level II DEMO	Virtual
Content Marketing - Demo	In-Person
Lockout Tagout - Demo	In-Person
WHMIS 2015 GHS - Demo	In-Person

You will have the option of creating a public or private offering. Private offerings are typically for employers that want to do in house training. Public offerings will publish to the storefront and be accessible to... the public.

OFFERING DETAILS

☒ Public Offering ☐ Private Offering

* Offering open to any individual or group

Publish Offering

☒

All required information will be marked with a red asterisk. These include instructor, number of seats, price, contact email, and date/time. If it is an in-person offering, you will be required to provide the address. If it is a virtual offering, you will need to include a link. If you don't have the course link (Zoom, WebEx, etc) yet, we suggest using your company url. You can update the offering information at a later date. More on that a little later.

If the training is free, set the price to \$0. If you don't want the price indicated on the storefront, click on the toggle under Show Price. Registrants will be advised to contact the training provider for pricing details.

A screenshot of a form with a 'Price' input field containing the letter 'd'. Below it is a 'Show Price' toggle switch, which is currently turned on (blue). A red rectangular box highlights the 'Show Price' toggle.

Special instructions are for any additional information specific to the offering. For example, if it is a virtual offering you might want to say 'sign in 5 minutes prior to course start'.

A screenshot of a text area labeled 'Special Instructions'. It contains the text 'Sign in 5 minutes before start of class'.

The last step is to choose the date and time. Choose the date from the calendar. The default is a full day course.

A screenshot of a dialog box titled 'Select time range for May 12th, 2023'. It has two input fields: 'Start Time' with '09:00 AM' and '(UTC-05:00)' and 'End Time' with '05:00 PM' and '(UTC-05:00)'. Each field has a calendar icon to its right. At the bottom are 'CANCEL' and 'APPLY' buttons.

To change this, click the calendar icon, set the time, and hit ok. If everything looks correct, hit apply.

A screenshot of a time picker interface. It shows a circular clock face with numbers 1 through 12. The hour hand is pointing to 9. Above the clock, it says '09:00' and 'AM'. Below the clock are 'CANCEL' and 'OK' buttons.

*If it is a multiple day course, repeat the process for any additional days.

After that, hit save. If any of the required information is missing, it will be highlighted in red and prevent you from saving.

Once successfully created, you will be brought back to the offerings page.

Manage Seats

Here we'll go over how to reserve and remove seats.

Let's start with reserving seats. There are two ways to do this but the first thing you want to do is locate the desired offering.

Once you have located the offering, you can reserve seats by clicking on Manage Seats or selecting Book Seats under More Options.

The screenshot shows a SkillsPass offering page for 'Communication Skills for Frontline Employees - Le...'. The offering is 'In-Person', 'Public', and 'Provided By SP TP Demo 2'. It has a time of '9:00 AM-5:00 PM'. A summary table shows 5 Total seats, 0 Booked, and 5 Available. A green 'MANAGE SEATS' button is highlighted with a red box. Below it is a 'Class Record' button. A 'More Options' dropdown menu is open, showing 'Edit', 'Duplicate', 'Book Seats' (highlighted with a red box), and 'Cancel Offering'.

Here you can book on behalf of an employer or for an individual. Choose Next beside the preferred option.

The 'Book Seats' page has two main sections. The first section, 'On Behalf of an Employer', includes instructions to 'Search an existing employer and reserve multiple seats.' or 'Add new employer and reserve multiple seats.', with a green 'NEXT' button. The second section, 'For an Individual', includes instructions to 'Search for an existing Attendee and reserve a seat.' or 'Add new Attendee and reserve a seat.', also with a green 'NEXT' button.

If you are booking on behalf of an employer, you will want to search for their network. If you see multiple results, look for the blue checkmark, that indicates the employer has a network in SkillsPass.

The 'EMPLOYER INFORMATION' section shows a search bar with 'Skillspass Demo' entered. Below the search bar, a result is shown for 'Skillspass Demo' with a blue checkmark and the name 'St. John's'. The address '18 Prescott St, Newfoundland A1C 3S4' is also displayed.

Fill out the required information for the booking contact, choose the number of seats required, select Add Booking, and hit confirm.

BOOKING CONTACT

Contact Name *

Tony Stark

Email Address *

tonys@example.email

Phone Number *

+1 (555) 555-5555

RESERVATION DETAILS

You will be asked to provide information about each student filling the seats in the next step.

Number of Seats *

3

Maximum 5 seats

Payment Method

Not Specified

ADD BOOKING

From here, you can add the attendees.

Name	Email	Phone Number
+ Add Attendee		

You can search by email address or phone number, but we recommend using email address. If no successful result shows, choose 'add new learner' to create a new attendee.

You can create using email address or phone number. Enter their name, select add, and hit confirm.

CREATE NEW ATTENDEE

Create New Attendee using

Email Address

Email Address *

example@steve.rogers

Please enter some more detailed contact information for the user:

First Name *

Steve

Last Name *

Rogers

Phone Number

ADD

Repeat the process for any additional seats.

You can also remove seats from here but let's go back to the start to show how to do that.



Locate the offering and select Manage Seats. From here, you can book seats which we already covered as well as removing seats.

MANAGE SEATS

Class Record

More Options

Locate the required booking, click the three dots to the right, and select Manage.

Bookings						BOOK SEATS
Name	Total	Assigned	Unassigned	Payment Method	Paid	
 Skillspass Demo Tony Stark	3	3	0	Not Specified ▾	<input type="checkbox"/>	...
						 Manage

To remove a specific attendee, click on the three dots, select remove attendee, and hit confirm.

Name	Email	Phone Number	
Steve Rogers Not Confirmed	example@steve.rogers		...
Peter Parker Not Confirmed	example@peter.parker		<div>  Send Invitation </div>
Wanda Maximoff Not Confirmed	example@wanda.maximoff		<div>  Remove Attendee </div>

Update Class Record


Updating the class record allows you to mark attendance, issue Pass/Fail grades, and award certificates.

The first thing you will want to do is locate the desired offering. You can sort using the filters or you can switch to the calendar view to locate by date.

To mark attendance and issue grades, select Class Record. If the button is greyed out, it means the offering hasn't happened yet. You can do a lot of cool things in training provider 2.0 but travelling to the future isn't one of them. At least not yet.

Feb 16, 2023

In-Person

Communication Skills for Frontline Employees - Le...
 Provided By **SP TP Demo 2**
 Public
 9:00 AM-5:00 PM
 More Details

5 Total

3 Booked

2 Available

MANAGE SEATS

Class Record

More Options ▾

Here you will see a list of everyone registered for the offering. You can mark attendance and issue grades individually or you can mark them all at once. If you choose Mark all as... you can adjust individuals after.

Name	Attendance Mark all as...	Grade Mark all as...	Additional Certificate Details
Steve Rogers Skillspass Demo example@steve.rogers	✓	<div> ✓ Passed ✗ Failed Clear Select </div>	...
Peter Parker Skillspass Demo example@peter.parker	✓	Select	...
Wanda Maximoff Skillspass Demo example@wanda.maximoff	✓	Select	...

If there are additional details for the offering like a specific model of equipment that was used, you can include this with Additional Certificate Details. Simply click Add, fill out the details, then select Save Changes.

Additional Certificate Details

For Steve Rogers (example@steve.rogers)

Max 200 characters

Edit Details

Shield - Vibranium

CANCEL

SAVE CHANGES

Once everything looks the way you want it to, hit Save Class Record. Before you do, it always pays to take a second look over. Once the record is saved, it can't be changed without contacting support. If everything looks good, hit Grade Students.

Save Class Record

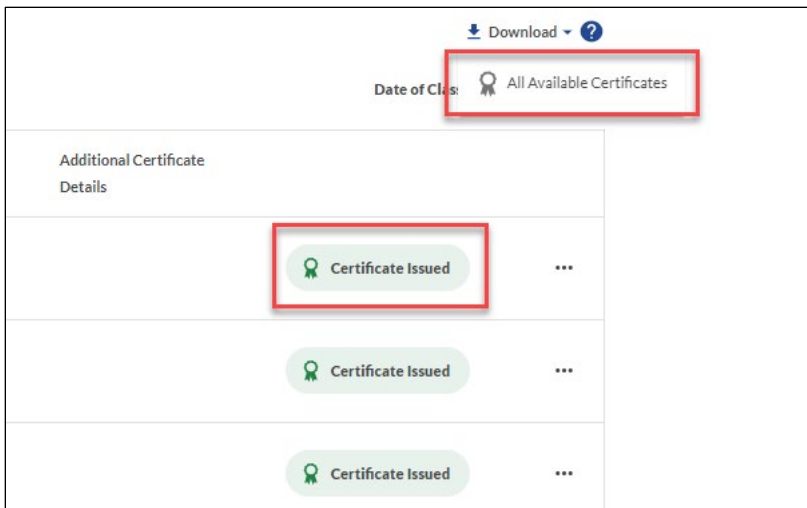
Once you save your class record, grades cannot be changed. Are you sure you want to make the following changes?

- Steve Rogers ✓ Passed
- Peter Parker ✓ Passed
- Wanda Maximoff ✓ Passed

CANCEL

GRADE STUDENTS

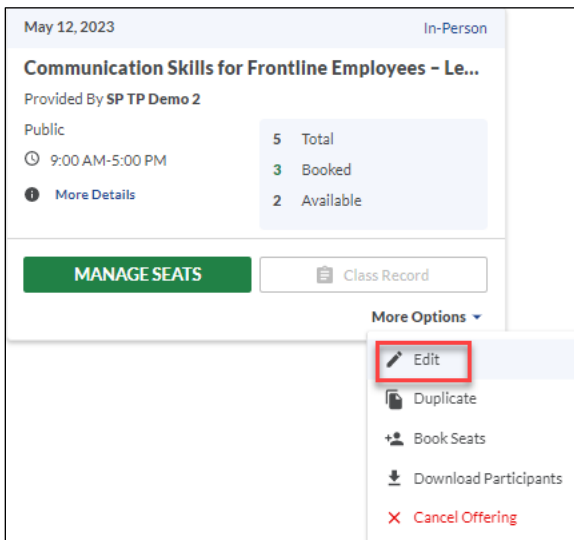
Now that the class record is updated, you will see the notification to show certificates have been issued. You also can download All Available Certificates.



Edit Offering

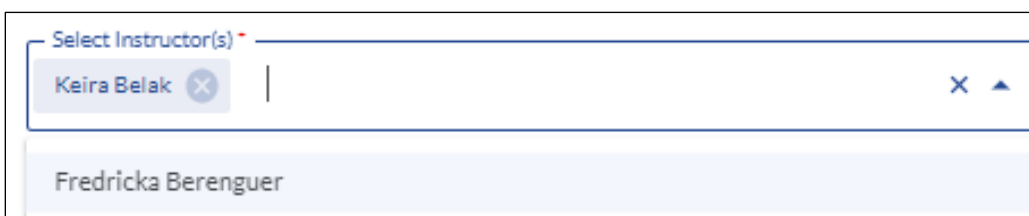
Editing an offering lets you do things like add additional seats, change the instructor, update the virtual link, and change the time. The one thing you can't do is change the type of offering it is. For example, if you created a full course but it was just meant to be a refresher, you chose In-Person but it was supposed to be Virtual, or you want meant to create a private offering, you will need to create an new offering.

Now that we have that out of the way, let's edit an offering. The first thing you will want to do is locate the desired offering. Once you have located it, click on More Options and choose Edit Offering.



You will see that the type of offering is set in stone but everything else is editable.

To change the instructor, you will want to choose the correct instructor from the dropdown menu and remove the previous instructor.



To add seats, just update the maximum number of seats. If you are adding seats for specific learners, click the publish offering toggle so that the seats don't get released on the storefront.

You can also edit the price, include special instructions, change the contact information, and update the date and time of the offering.

If you are changing the date of the offering, select the new date from the calendar and click on the X to remove the current date.

The screenshot shows a 'SELECT DATE(S)' interface. On the left is a calendar for February 2023. The date 16th is highlighted. On the right, under 'Selected Dates (2)', there are two entries: 'February 16th, 2023' and 'May 12th, 2023'. Each entry has a time range '9:00 AM-5:00 PM (UTC-05:00)' and a close button (X). The close button for the May 12th entry is circled in red. At the bottom right is a green 'SAVE' button.

Once you have made your desired changes, hit save.

Anyone with a registered seat in the offering as well as booking contacts will receive email notifications about the changes.

If you need to create a new offering because it was supposed to be virtual, a refresher, etc... you can cancel the incorrect one by hitting More Options and choosing Cancel Offering.

The screenshot shows a 'More Options' dropdown menu. The options are: Edit, Duplicate, Book Seats, Download Participants, and Cancel Offering. The 'Cancel Offering' option is highlighted with a red box.

Admin

When you sign into your training provider profile and select Admin, you will have a record of everyone that has done training with you, as well as being able to update learner information, and merge profiles.

OFFERINGS		ADMIN
LEARNERS		
Search by	<input type="text" value="Name"/> <input type="text" value="Search"/>	
Name	Email	
Wanda Maximoff Not Confirmed	example@wanda.maximoff	
Peter Parker Not Confirmed	example@peter.parker	
Steve Rogers Not Confirmed	example@steve.rogers	


If you have learners reaching out to you saying ‘I need a copy of my training’ or ‘I didn’t get an email for my SkillsPass profile’, you can help them out with a couple of clicks.


As more time passes, more learners will show up here. You can sort by name, email address, or phone number. As well you can search them by name.

If you see ‘not confirmed’ under their name, it means that they haven’t activated their SkillPass yet.

Name	Email
Wanda Maximoff Not Confirmed	example@wanda.maximoff
Peter Parker Not Confirmed	example@peter.parker
Steve Rogers Not Confirmed	example@steve.rogers


You can help them with this by clicking on the three dots to the right of their name and hitting send invitation. This will prompt an email that will let them access their SkillsPass Worker Passport.


 Update

 Send Invitation

Update

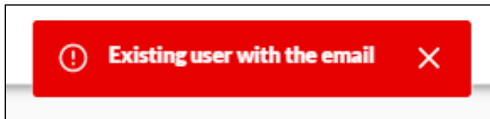
One of the great features of the new Training Delivery Suite is that it allows you to update a learner’s contact information. To do this, click on the ellipsis to the right of the learner’s name and select Update.

 Update

 Send Invitation

Here you will be able to update the name (first and last), email address, and phone number. Once completed, hit update.

If you receive an error message saying the email address already belongs to a learner, it means a merge might be required.



Merge

Another feature of Training Provider 2.0 is the ability to merge learner profiles. This is useful if a learner has done training with you on different occasions but provided different information like email addresses.

Name	Email
Christopher Evans Not Confirmed	email@christopher.evans
Chris Evans Not Confirmed	email@chris.evans

The process to merge profiles is simple. The first thing you will want to do is make note of the email addresses to merge. Once you have done that, click on the green Merge button.



Enter the email address for each profile and click the magnifying glass icon. The account on the left is the one that you want to keep. Once both accounts have been located, hit Merge in the bottom right corner.

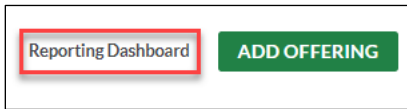
<div><div>Learner to Keep</div><div>email@chris.evans</div><div>×</div><div>Q</div></div> <div>We will keep and update this account:</div> <div><div>Chris Evans</div><div>System ID: TQPX8Z</div><div>Email Address: email@chris.evans</div><div>Communication Skills for Frontline Employees - Level I DEMO</div><div>In-Person Completed Passed</div><div>Completed: Mar 1, 2023</div><div>Expiry: Mar 1, 2026</div></div>	<div><div>Learner to Remove</div><div>email@christopher.evans</div><div>×</div><div>Q</div></div> <div>And remove this account:</div> <div><div>Christopher Evans</div><div>System ID: U4B2GX</div><div>Email Address: email@christopher.evans</div><div>Lockout Tagout - Demo</div><div>In-Person Completed Passed</div><div>Completed: Mar 7, 2023</div><div>Expiry: Mar 7, 2026</div></div>
<div>CANCEL MERGE</div>	

If everything looks correct, hit Confirm. If you need to change one of the accounts, hit Back.



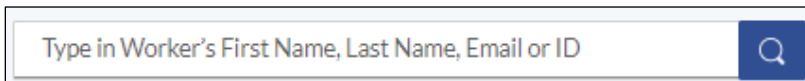
Reporting

Reporting lets you track and manage any training that has been done with your network. To access this, sign into your Training Provider profile and select Reporting Dashboard.

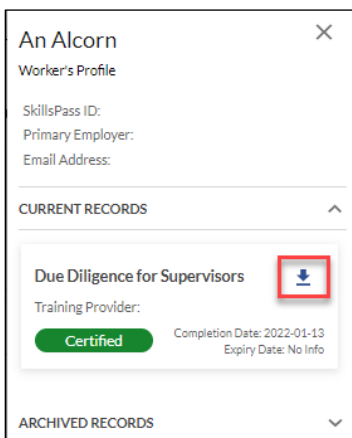


In the Dashboard, you will have access to all issued certificates for learners that have done training with you.

If you are trying to locate a specific individual, you can use the search function to locate them by name, email address, or SkillsPass ID.



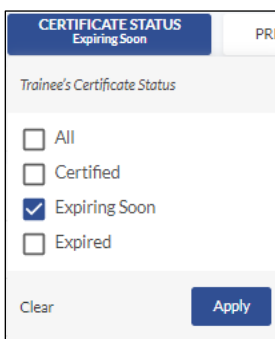
Once you have located the desired learner, click anywhere on their profile to bring up their training history. You can download a copy of their certificate by clicking on the download icon.



You can also sort by using the filters for completion date, certificate status, primary employer, and/or course.



Using the filters is a great way to create custom reports. It is like using the filters to create your own filters. For example, if you wanted to keep track of learners that had training expiring soon, go to the Certificate Status filter, select Expiring Soon, and hit Apply.



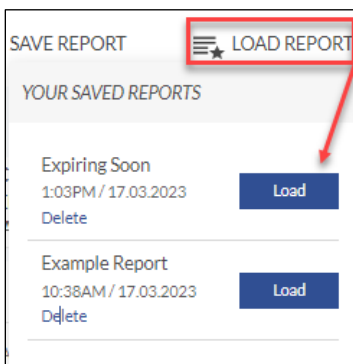
After that, select Save Report.



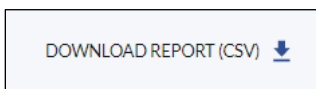
Give your report a name that will make it easy to locate in the future, then hit Save.

A dialog box titled "SAVE YOUR REPORT". It contains a text input field with "Expiring Soon" entered. Below the field is a note: "After saving this report, you may load it anytime by using Load report option." At the bottom are "Cancel" and "Save" buttons.

Next time you want to generate that information, just click on Load Report, locate it from the list of reports, and click Load.



The option to download a copy of the report will appear in the bottom right corner of the report.



Help

If you didn't find what you were looking for in this guide or need some assistance, click Help. FAQ will bring you to our knowledge-base articles and How-To videos. Choose Contact Support if you want to reach out to a member of our Customer Support team.

