Welcome to new and improved SkillsPass Training Delivery Suite!

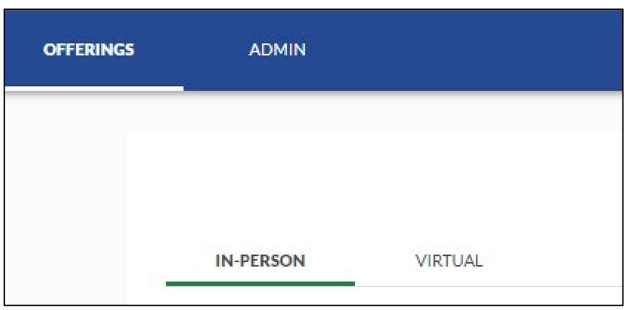
Before we get started, let's make sure you are using a supported browser. Chrome, Firefox, Edge, and Safari are a-ok. If you are trying to use Internet Explorer, prepare to be frustrated. It is enjoying a well-earned retirement.

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

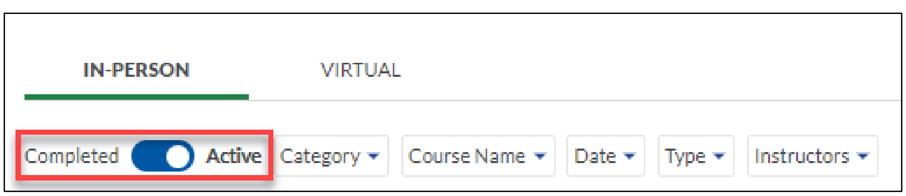
- Add Offering – In order to provide training, you need training to provide.
- Manage Seats – If you offer training, they will come.
- Update Class Record – Be the Oprah of awarding certificates.
- Edit Offering – You might not be able to make change for $20 but you can for an offering.
- Admin – Still 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

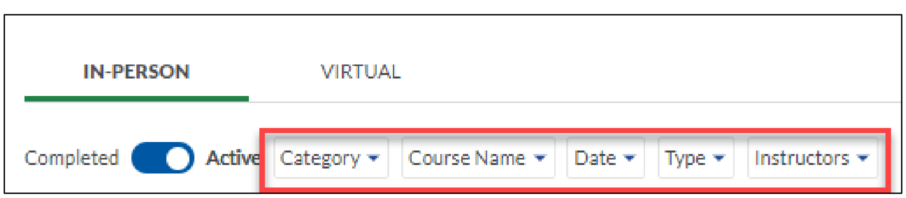
When you sign in, you will be brought to the Offerings page. The default setting is active In-Person offerings. To switch to virtual offerings, click Virtual. We're not trying to trick you here.



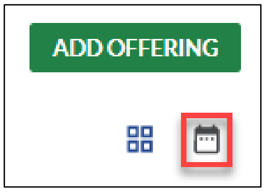
Active offerings are offerings that are upcoming or where the class record hasn't been updated yet. To switch to completed offerings, select the toggle to switch.



You can narrow your search by using the filters.



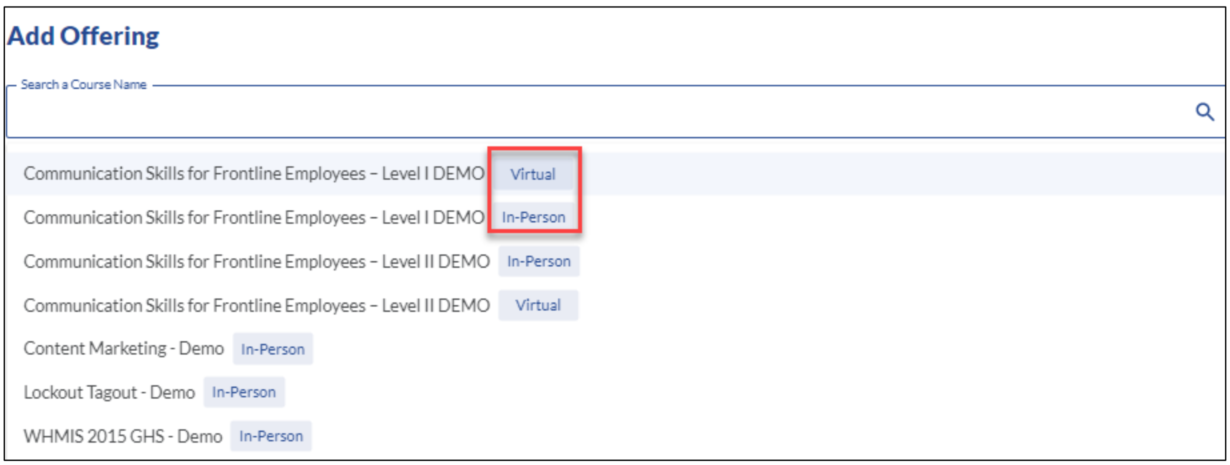
If you would like to locate training from a specific date, you can use the date filter or switch to calendar view.



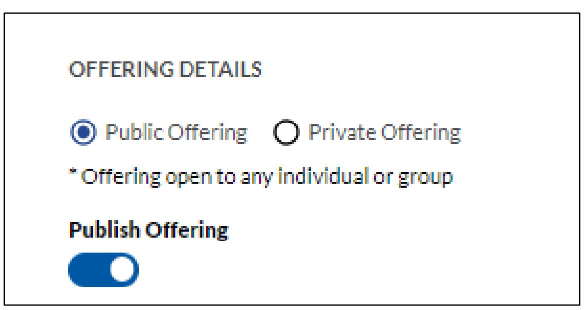
Add Offering

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.

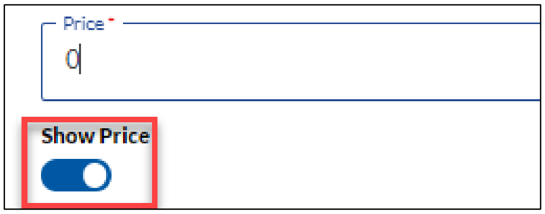


You will have the option of creating a public or private offering. Private offerings are typically for employers that want to do in house training. Public offerings will publish to the storefront and be accessible to… the public.

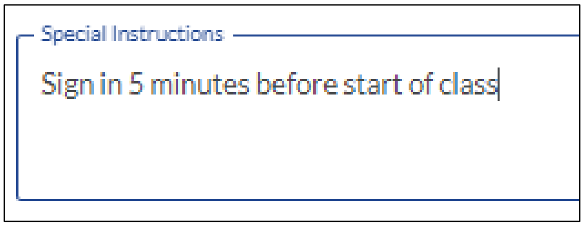


All required information will be marked with a red asterisk. These include instructor, number of seats, price, contact email, and date/time. If it is an in-person offering, you will be required to provide the address. If it is a virtual offering, you will need to include a link. If you don't have the 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.

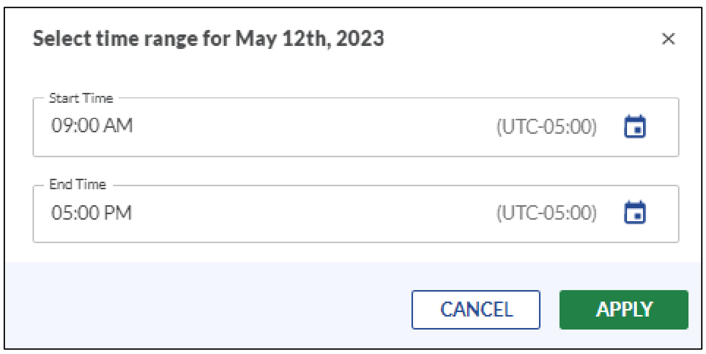
If the training is free, set the price to $0. If you don't want the price indicated on the storefront, click on the toggle under Show Price. Registrants will be advised to contact the training provider for pricing details.



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’.



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



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

*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.

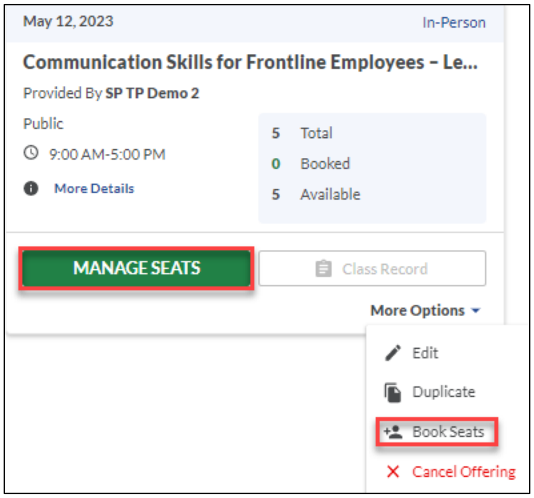
Once successfully created, you will be brought back to the offerings page.

Manage Seats

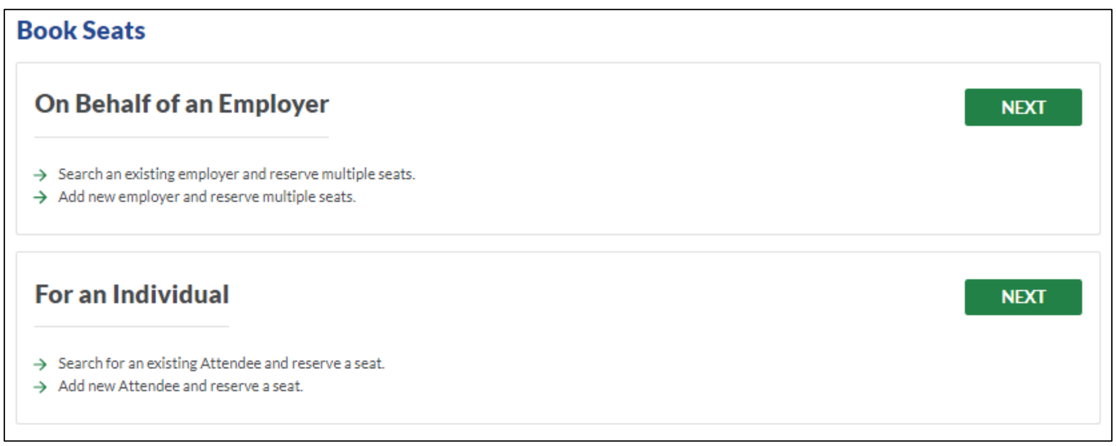
Here we'll go over how to reserve and remove seats.

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.

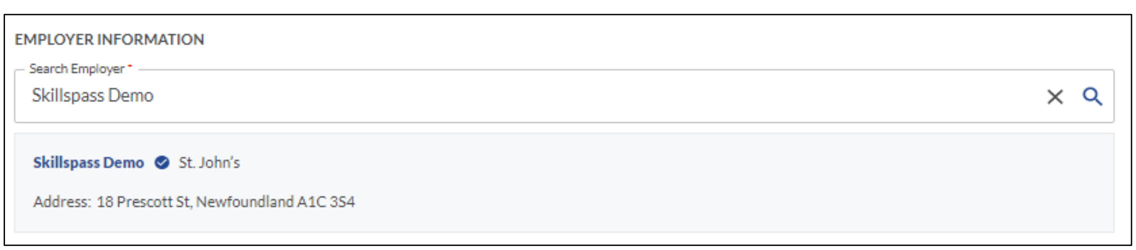
Once you have located the offering, you can reserve seats by clicking on Manage Seats or selecting Book Seats under More Options.



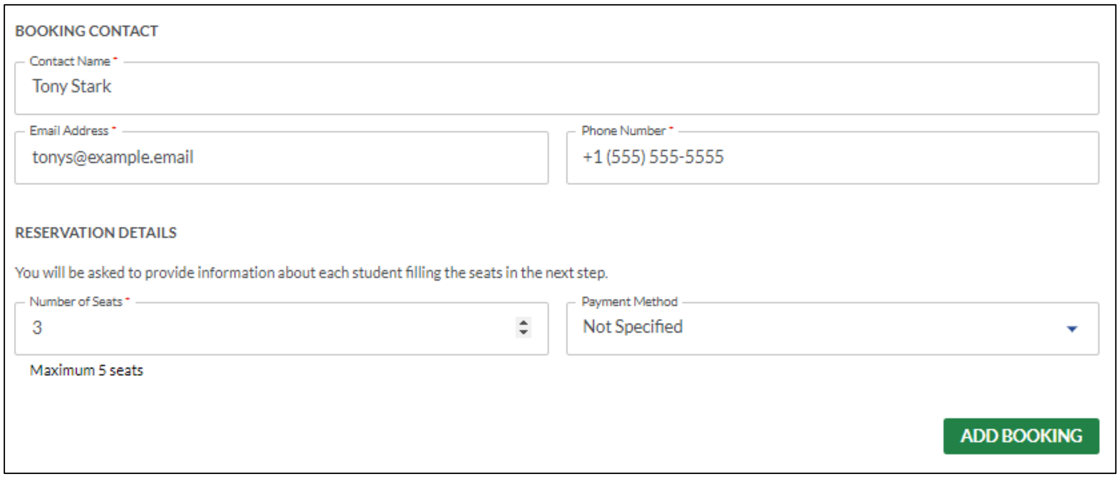
Here you can book on behalf of an employer or for an individual. Choose Next beside the preferred option.



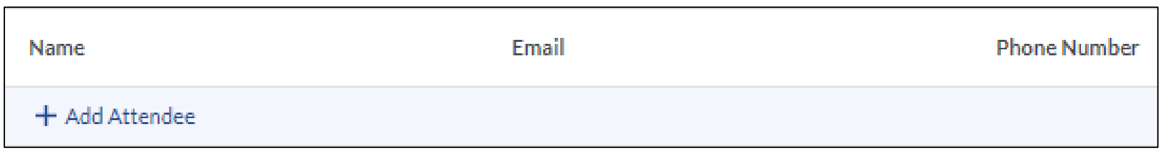
If you are booking on behalf of an employer, you will want to search for their network. If you see multiple results, look for the blue checkmark, that indicates the employer has a network in SkillsPass.



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

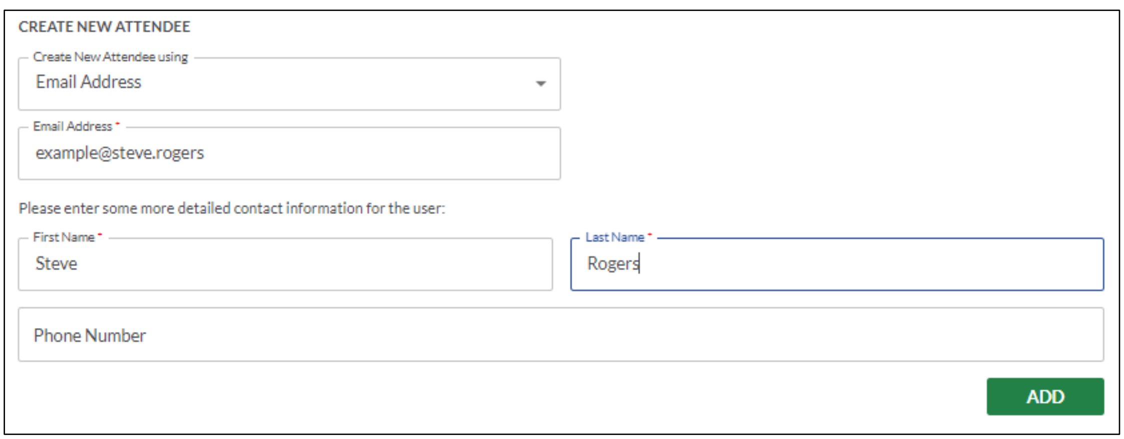


From here, you can add the attendees.



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.

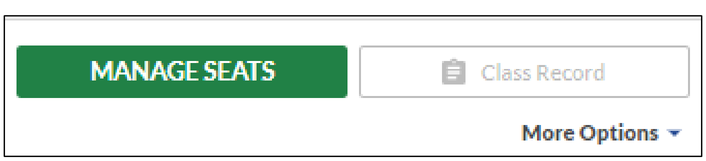
You can create using email address or phone number. Enter their name, select add, and hit confirm.



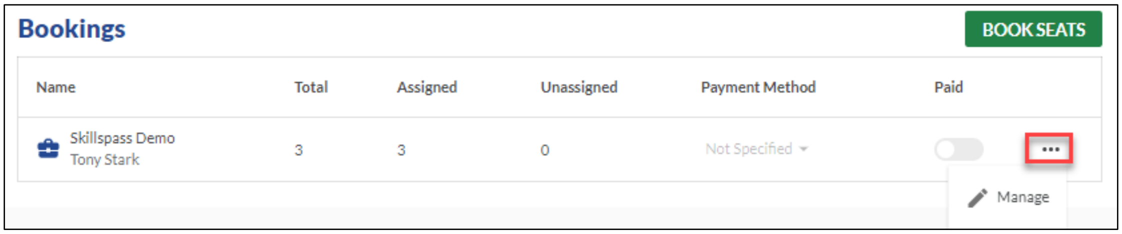
Repeat the process for any additional seats.

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.



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



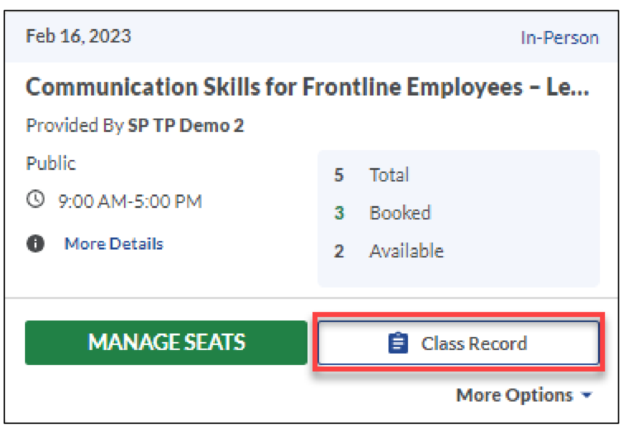
To remove a specific attendee, click on the three dots, select remove attendee, and hit confirm.

Update Class Record

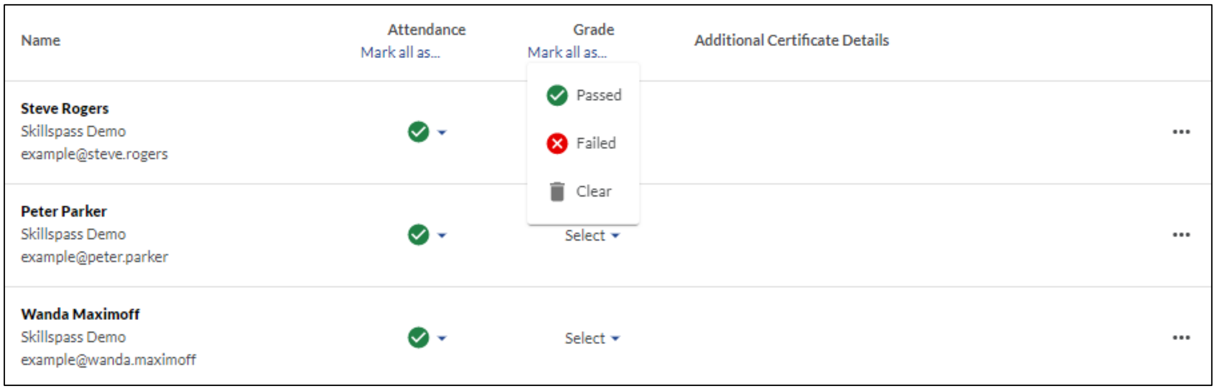
Updating the class record allows you to mark attendance, issue Pass/Fail grades, and award certificates.

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.

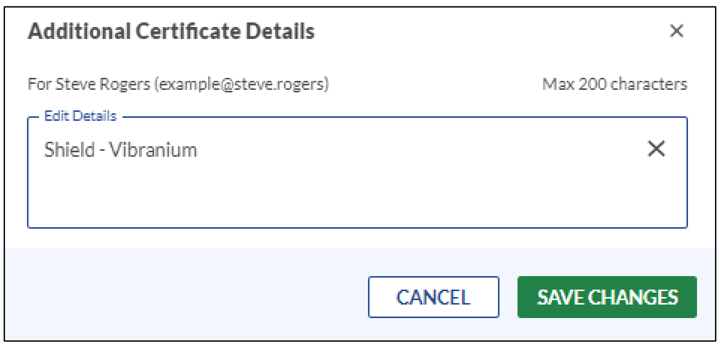
To mark attendance and issue grades, select Class Record. If the button is greyed out, it means the offering hasn't happened yet. You can do a lot of cool things in training provider 2.0 but travelling to the future isn't one of them. At least not yet.



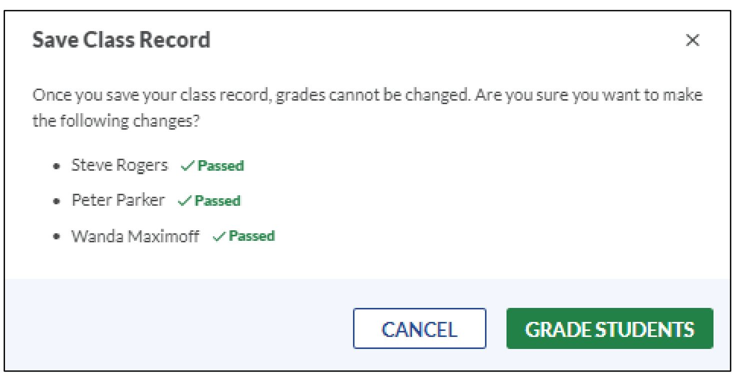
Here you will see a list of everyone registered for the offering. You can mark attendance and issue grades individually or you can mark them all at once. If you choose Mark all as… you can adjust individuals after.



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.



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.

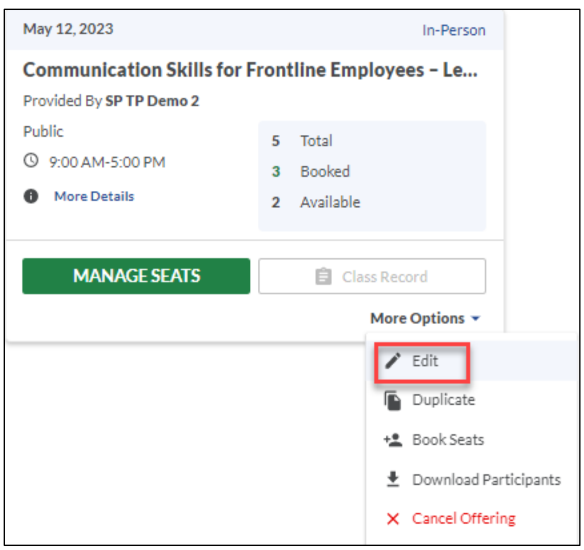


Now that the class record is updated, you will see the notification to show certificates have been issued. You also can download All Available Certificates.

Edit Offering

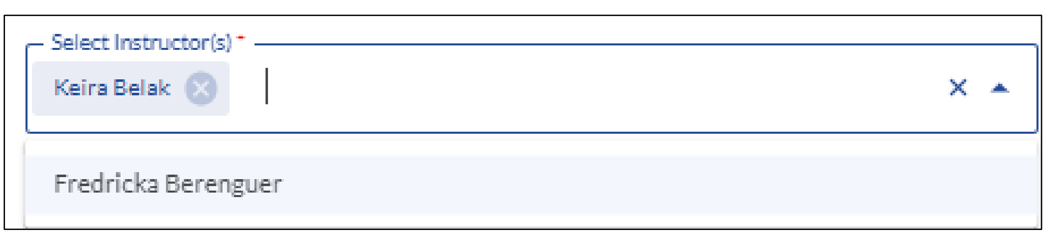
Editing an offering lets you do things like add additional seats, change the instructor, update the virtual link, and change the time. The one thing you can't do is change the type of offering it is. For example, if you created a full course but if was just meant to be a refresher, you chose In-Person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

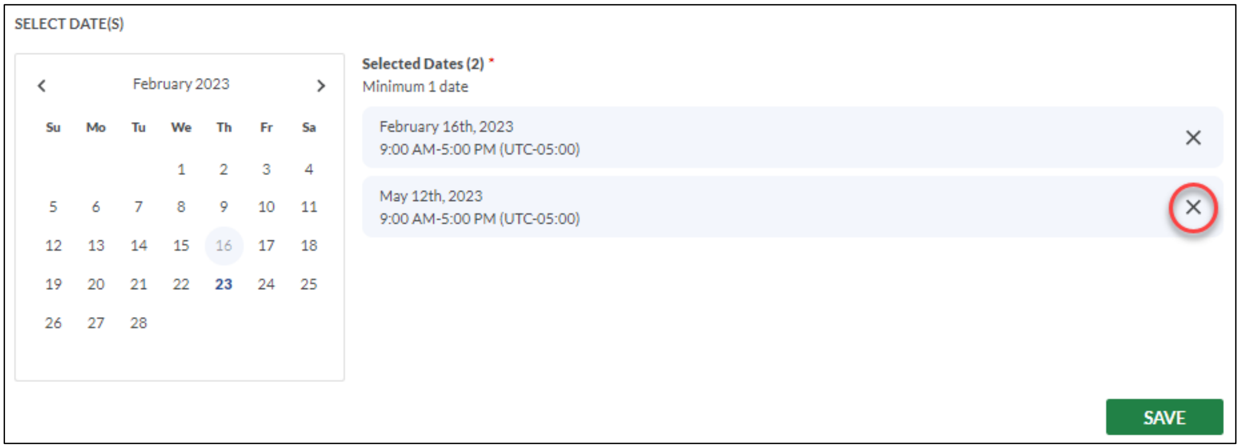
To change the instructor, you will want to choose the correct instructor from the dropdown menu and remove the previous instructor.



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.

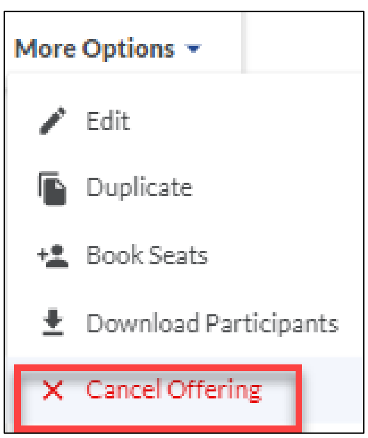
If you are changing the date of the offering, select the new date from the calendar and click on the X to remove the current date.



Once you have made your desired changes, hit save.

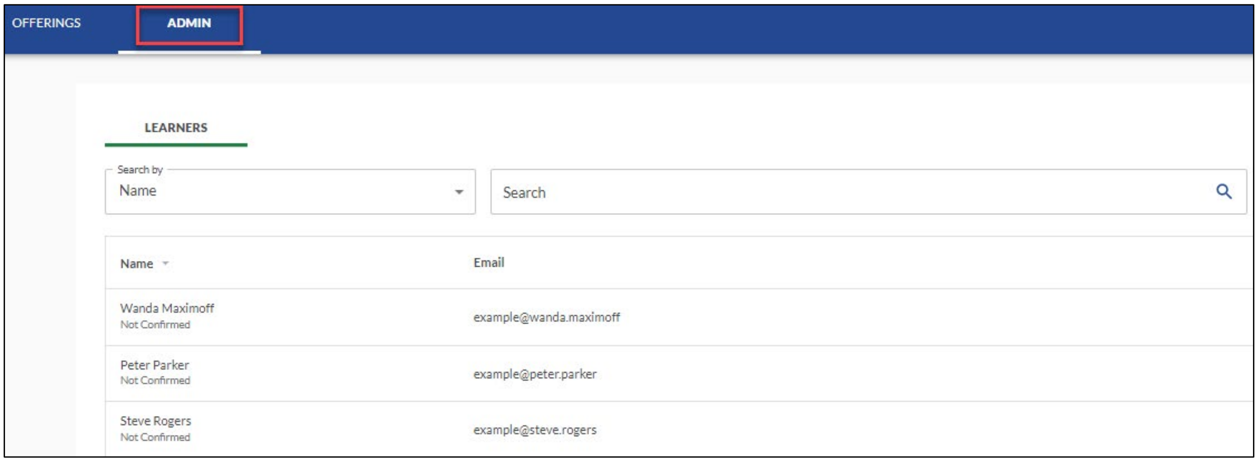
Anyone with a registered seat in the offering as well as booking contacts will receive email notifications about the changes.

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.



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.



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.

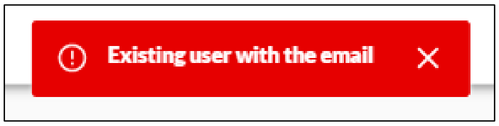
You can help them with this by clicking on the three dots to the right of their name and hitting send invitation. This will prompt an email that will let them access their SkillsPass Worker Passport.

Update

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.

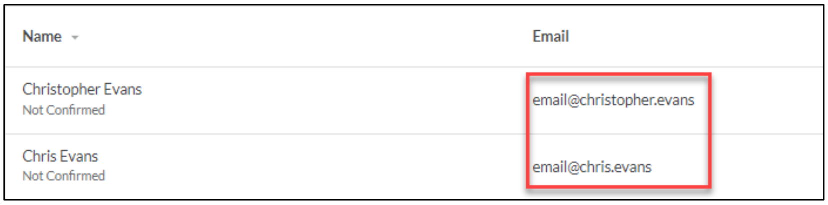
Here you will be able to update the name (first and last), email address, and phone number. Once completed, hit update.

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

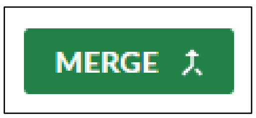


Merge

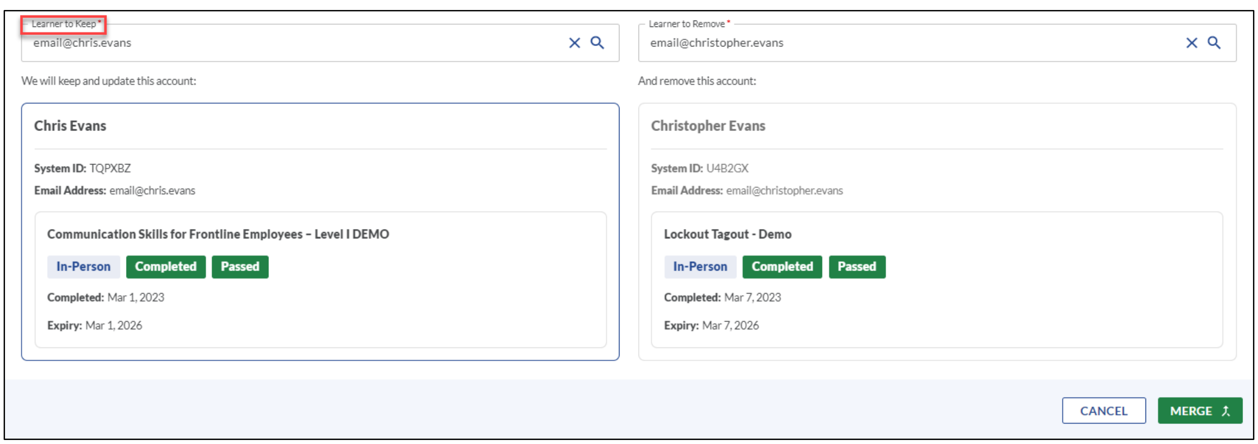
Another feature of Training Provider 2.0 is the ability to merge learner profiles. This is useful if a learner has done training with you on different occasions but provided different information like email addresses.



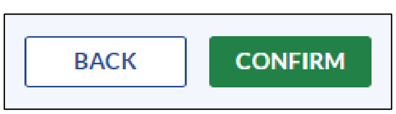
The process to merge profiles is simple. The first thing you will want to do is make note of the email addresses to merge. Once you have done that, click on the green Merge button.



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.

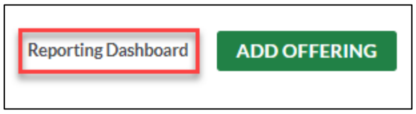


If everything looks correct, hit Confirm. If you need to change one of the accounts, hit Back.



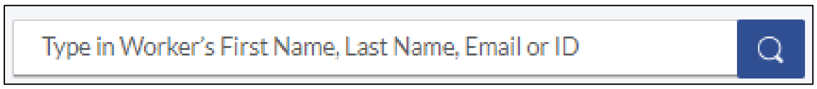
Reporting

Reporting let's 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.

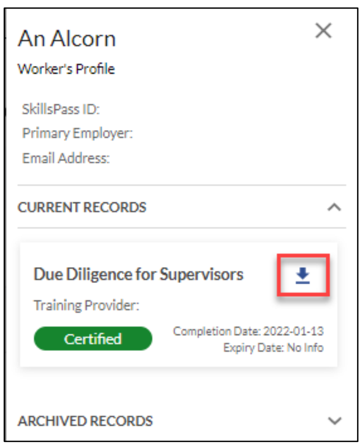


In the Dashboard, you will have access to all issued certificates for learners that have done training with you.

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.

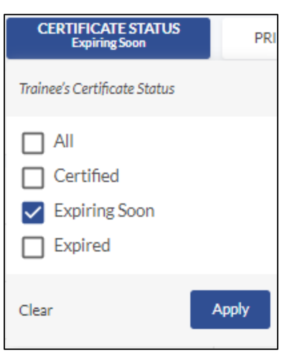


Once you have located the desired learner, click anywhere on their profile to bring up their training history. You can download a copy of their certificate by clicking on the download icon.



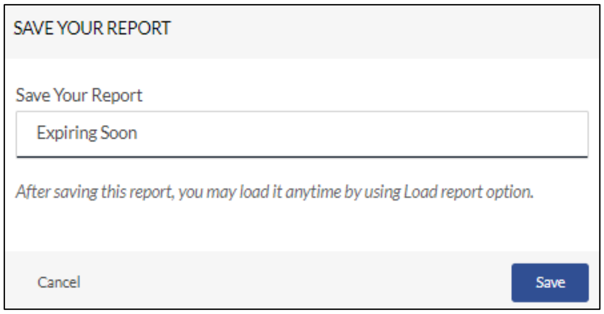
You can also sort by using the filters for completion date, certificate status, primary employer, and/or course.

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.

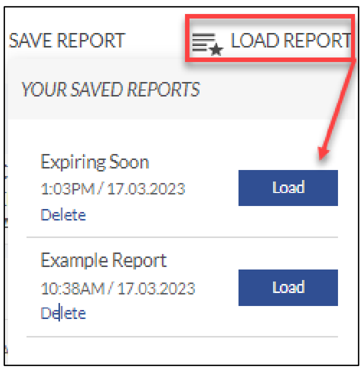


After that, select Save Report.

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



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.