YOUR GUIDE TO

WALLED GARDEN

City&Guilds | ilm | City&Guilds kineo

YOUR GUIDE TO WALLED GARDEN

Walled Garden is a secure online administration system for City & Guilds and ILM customers.

This guide will take you through each function of Walled Garden step by step. Use the contents table to find the task that you wish to perform, then simply follow the detailed instructions.

In addition, you can also watch overview video demonstrations covering the main administration processes. These can be found on our resource hub.

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CANDIDATE REGISTRATIONS

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CREATE A NAMED REGISTRATION ORDER: A COHORT OF CANDIDATES

Introduction
This quick reference guide shows you how to raise a named registration order for a cohort of candidates in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Notes for centre:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section (Orders can be made from **My Favourites** and **Frequently Ordered Products** as well should you wish). The button for the section you are in will be highlighted in blue.*

Step 2:
In the **Search catalogue** bar, enter the qualification name, qualification number or QAN number you wish to place an order for.

Notes for centre:
- *Ensure that you select either City & Guilds or ILM depending on which qualification you wish to place an order for*
- *A list will start to appear after the third character is typed into the search catalogue field.*

Step 3:
Select the approved qualification from the list displayed that you wish to place an order for. You will then be taken to the qualification page.

Notes for centre:
- *The last registration date needs to be green in order to place an order.*

Step 4:
Click the **Place an order** button.

Step 5:
In the **Select order type** section, click **Named registration** (this button will turn blue when selected).

Step 6:
In the **Add candidate** section, click Cohort

Step 7:
Select the required cohort name from the drop down **Cohort name** menu bar.

The candidates in the selected cohort will be listed. Untick those candidates you do not wish to be added to the order and then click **Add to basket**

Step 8:
A confirmation message that the candidate has been successfully added to the basket will appear. You will also be asked if you wish to add another candidate.

If you wish to add another candidate, click **Yes** and repeat **Step 7**
If you only wish to add one candidate, click **No.**

Step 9:
A list of candidates that you have created are now listed in the **Added to basket** area. If you are happy to proceed, click **View Basket**

Step 10:
In the Order Summary screen, you can review, add or delete candidates on your order. If you are happy to proceed, click **Continue**

Step 11:
Qualification dependant, you may also be able to select logbooks or publications to be added to the order.

If this is an option, select the logbook or publication you wish to order, insert the quantity you wish to order and click **Add**
Then click **Continue**

Step 12:
If any materials were ordered in the previous step, you will be presented with the option to choose a delivery address. Click **Continue**

Step 13:
In the **payment** screen, you can review charges related to order, as well as select payment type. Enter your reference or purchase order number in the mandatory field.

Click **Buy now** if payment is on account or **Pay now via Worldpay** if payment with by credit/debit card.

Step 14:
An order confirmation screen is displayed, confirming the order number, qualification details, candidates and cost.
You can print a copy of the order by selecting **Print page** or complete the **send a duplicate confirmation to** field to send a copy by email.

CREATE A NAMED REGISTRATION ORDER: A NEW CANDIDATE

Introduction
This quick reference guide shows how to create a named registration order for a new candidate in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Catalogue** on the first navigation bar.

Note to centre:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section (Orders can be made from **My Favourites** and **Frequently Ordered Products** as well should you wish). The button for the section you are in will be highlighted in blue.*

Step 2:
In the **Search catalogue** bar, enter the qualification name, qualification number or QAN number you wish to place an order for.

Notes for centre:
- *Ensure that you select either City & Guilds or ILM depending on which qualification you wish to place an order for*
- *A list will start to appear after the third character is typed into the search catalogue field.*

Step 3:
Select the qualification from the list displayed that you wish to place an order for and you will then be taken to the qualification page.

Notes for centre:
- *The last registration date needs to be green in order to place an order.*

Step 4:
Click the **Place an order** button.

CREATE A NAMED REGISTRATION ORDER: A NEW CANDIDATE ON AN ENDORSED OR DEVELOPMENT PROGRAMME

Please note: this is for customers that work with ILM only

Introduction

This quick reference guide shows you how to raise a named registration order for a new candidate on an Endorsed or Development programme in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Catalogue** on the first navigation bar.

Note to centre:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section (Orders can be made from **My Favourites** and **Frequently Ordered Products** as well should you wish). The button for the section you are in will be highlighted in blue.*

Step 2:
In the **Search catalogue** bar, enter the programme name or programme number you wish to place an order for.

Notes for centre:
- *Ensure that you select either City & Guilds or ILM depending on which programme you wish to place an order for.*

Step 3:
Select the programme from the list displayed that you wish to place an order for and you will then be taken to the qualification page.

Notes for centre:
- *The last registration date needs to be green in order to place an order.*

Step 4:
Click the **Place an order** button.

Step 5:
In the **Select order type** section of the screen, click Named registration

Step 6:
In the **Add candidate** section, click Add new candidate

Step 7:
Enter details for the candidate in the fields shown and then click **Add new candidate** (Please note that * denotes a mandatory field).

Check the details carefully as this information is used for your candidate's certificate.

Step 8:
A confirmation message that the new candidate has been successfully added to the basket will appear. You will also be asked if you wish to create another candidate.

If you wish to create another candidate, click **Yes** and repeat **Step 7**
If you only wish to create one candidate, click **No.**

Note: if you have more than five new candidates to create, then you will be asked to create a cohort name.

Step 9:
The candidate/s that you have created are now listed in the Added to basket area at the base of the screen. Click **View Basket**

Step 10:
In the order summery section, you can review your order. If your order is complete, click **Continue**

Step 11:
In the options screen, you will have the option to personalise the certificate. Click the relevant option depending on whether you wish to configure the certificate or not.

Step 12:
Once completed, or to move to proceed with payment, click **Continue**

CREATE A NAMED REGISTRATION ORDER: AN EXISTING CANDIDATE

Introduction
This quick reference guide shows you how to raise a named registration order for an existing candidate in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Note:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the* **Show approved** *section. (the button for the section you are in will be highlighted in blue).*

Step 2:
Within the **Approved qualifications** click on the qualification you wish to place an order for.

Step 3:
On the course information page, select **Place An Order**

Step 4:
To raise a Named Registration Order, click Named registration

Step 5:
To add a candidate, click Candidate details (the button will be highlighted in blue once selected).

Step 6:
In the **Search by candidate details** area of the screen, enter the candidates last name (mandatory) and further search criteria in the other fields to assist in the search and click **Search**

Step 7:
Candidates matching the search criteria are listed in the results table. Select the candidate/s that you wish to place the order for and click **Add to basket**

A confirmation message that the candidate has been successfully added to the basket will appear. You will also be asked if you wish to add another candidate.

If you wish to add another candidate, click **Yes** and repeat **Step 7**
If you only wish to add one candidate, click **No.**

Step 8:
A list of candidates that you have created are now listed in the **Added to basket** area. If you are happy to proceed, click **View Basket**

Note: If you have more than five candidates, you will have the option to create a cohort name.

Step 9:
In the Order Summary screen, you can review, add or delete candidates on your order. If you are happy to proceed, click **Continue**

Step 10:
Qualification dependant, you may also be able to select logbooks or publications to be added to the order.

If this is an option, select the logbook or publication you wish to order, insert the quantity you wish to order and click **Add** then Click **Continue**

Step 11.
If any materials were ordered in the previous step, you will be presented with the option to choose a delivery address. Click **Continue**

Step 12:
In the **payment** screen, you can review charges related to order, as well as select payment type. Enter your reference or purchase order number in the mandatory field.

Click **Buy now** if payment is on account or **Pay now via Worldpay** if payment with by credit/debit card.

Step 13:
An order confirmation screen is displayed, confirming the order number, qualification details, candidates and cost.
You can print a copy of the order by selecting **Print Page** or complete the **send a duplicate confirmation to** field to send a copy by email.

CATALOGUE

Catalogue NEW 16
Rules of Combination NEW 18

CATALOGUE

Introduction
This quick reference guide highlights the catalogue section on Walled Garden.

Step 1:
From the **Homepage,** select the **Catalogue** tab from the first navigation panel.

Step 2:
If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for.

If your centre works with both City & Guilds and ILM, you will have the option to select your sub centre to view relevant information for that centre on this page. This option will only be visible at main centre level.

Under the centre panel or second navigation panel (user dependant) you will have the following options;

SHOW APPROVED	Allows you to see qualifications that your centre is approved to offer.
VIEW ALL	Allows you to see all qualifications available from either City & Guilds or ILM catalogues.
INDUSTRY/SECTOR	Allows you to search for qualifications by industry / sector.
MY FAVOURITES	Will show qualifications that you have marked as favourite.
FREQUENTLY ORDERED PRODUCTS	Allows you to view qualifications by industry / sector indicating those qualifications that are more frequently ordered. This can be sorted by your top 10 frequently ordered or all qualifications by clicking the buttons above the list. ***Note:*** *user profile sensitive – Finance user, Tutor user and Read Only user profiles will not see frequently ordered products tab.*

Step 3:
In order to make an order, ensure that you are in the **SHOW APPROVED** tab. This will be highlighted in blue when selected.

In this section you can;
- Search by qualification number, qualification name and QAN number. Results will be displayed in the table below following the third character inputted into the search bar.
- Advanced search is an expandable section, allowing you to narrow down results in the table by qualification route, qualification type or subtype. You will also have the option to exclude qualifications with expired registration dates from the results returned by ticking this option.
- Results will be displayed in the table below, if your centre works with both ILM and City & Guilds, you can view both ILM and City & Guilds qualifications by selecting the relevant tab.
- The number of results shown can be selected from the drop down menu above the top right hand of the table.
- You can filter each column in the results table ascending or descending.

Step 4:
If you would like to apply for approval for a new qualification, please ensure that you are in the **VIEW ALL** tab. In this section you can;
- Search by qualification number, qualification name and QAN number. Results will be displayed in the table below following the third character inputted into the search bar.
- Advanced search is an expandable section, allowing you to narrow down results in the table by qualification route, qualification type or subtype. You will also have the option to exclude qualifications with expired registration dates from the results returned by ticking this option.
- Results will be displayed in the table below, if your centre works with both ILM and City & Guilds, you can view both ILM and C&G qualifications by selecting the relevant tab.
- The number of results shown can be selected from the drop down menu above the top right hand of the table.
- You can filter each column in the results table ascending or descending.

Once a qualification is selected, you will be presented with an option to apply for approval.

Note: By clicking yes, you will be taken to our website for more information on how and where to apply for approval.

RULES OF COMBINATION

Introduction
This quick reference guide introduces a new function, the Rules of Combination on Walled Garden. The Rules of Combination section will now calculate the units necessary for each qualification, saving you the trouble of working this out by hand.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Note to centre:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section (Orders can be made from **My Favourites** and **Frequently Ordered Products** as well should you wish). The button for the section you are in will be highlighted in blue.*

Step 2:
In the **Search catalogue** bar, enter the qualification name, qualification number or QAN number you wish to place an order for.

Notes for centre:
- *Ensure that you select either City & Guilds or ILM depending on which qualification you wish to place an order for.*

Step 3:
Select the qualification that you wish to place an order for from the list displayed. You will then be taken to the qualification page.

Note: The last registration date needs to be green in order to place an order.

Step 4:
Select the ▸ Rules of combination – interactive

Step 5:
Each mandatory combination of units/credits/modules is arranged in its own section.
Select the units/credits/modules from the list presented. Once the correct number of units/credits/modules is selected the box will turn green.

Once all units/credits/modules are selected in each section, the box at the foot of the page will change from **Qualification not achieved** to **Qualification achieved**

If the box does not turn green it means an insufficient or incorrect number of units / credits / modules have been selected.

RESULTS ENTRY

Create a results entry order:

A dual certificate or Apprenticeship 21
A full qualification 23
A single unit 25

CREATE A RESULTS ENTRY ORDER: A DUAL CERTIFICATE OR APPRENTICESHIP

Introduction
This quick reference guide shows you how to create a results order for a dual certificate or Apprenticeship, for a candidate in Walled Garden. You will need to create two results entry orders, one for the NVQ component and one for the VRQ component.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Note:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section. (the button for the section you are in will be highlighted in blue).*

Step 2:
Within the Approved qualifications table, select the NVQ qualification you want to create a results entry for.

Alternatively, you can search for a qualification by entering the required qualification name or code in the **Search catalogue** field.

Step 3:
If you would like to validate your order, select
▸ Rules of combination – interactive from the information list on the course information list.
Once validated, select **Place an order**

Step 4:
In the Select order type section, select Results entry
(the button for the section will be highlighted in blue when selected).

Step 5:
In the **Unit or assessment available** section, select the required combination of qualifying units and then click **Continue**

Step 6:
In the candidate selection screen, you can search for existing candidates by selecting the required field from the drop down list. To search by candidate name, select **candidate details** from the list. Enter the candidates last name (mandatory field) and click **Search**

Step 7:
Candidates matching the search criteria are listed in **your search results** section of the screen. Select the candidate you wish and click **Add To Order** and then **Continue**

Step 8:
In the **Assign units or assessments to candidates'** area of the screen, candidates' details will be present. In the **product code**/grade column, select **P** (for pass) or **X** (for fail) from the drop down menu. Click **Continue**

Step 9:
In the checkout screen, enter your purchase order number or order reference in the Your PO/Ref field (This is mandatory). Click **Submit Order** Place the order.

Step 10:
A message box will be displayed, asking if you would like to place the order, click **OK** to place the order.

Step 11:
An order confirmation screen will be displayed confirming your order number. You will have the option to print this confirmation should you wish.

Step 12:
Repeat steps this time selecting the VRQ component of the qualification.

CREATE A RESULTS ENTRY ORDER: A FULL QUALIFICATION

Introduction
This quick reference guide shows you how to create a results entry order for a full qualification for a candidate in Walled Garden

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Note:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for.*
- *Ensure that you are in the **Show approved** section. (the button for the section you are in will be highlighted in blue).*

Step 2:
Within the Approved qualifications table, select the qualification you want to create a results entry for.

Alternatively, you can search for a qualification by entering the required qualification name or code in the **Search catalogue** field.

Step 3:
If you would like to validate your order, select on the course information page.
Once validated, select **Place an order**

Step 4:
In the Select order type section, select Results entry (the button will be highlighted in blue when selected).

Step 5:
In the search field, you can search for the unit or assessment number in the format 0000–000 or select from the units/assessments listed below.
Click **Continue**

Step 6:
In the candidate selection screen, you can search for existing candidates by selecting the required field from the drop down list. To search by candidate name, select **candidate details** from the list. Enter the candidates last name (mandatory field) and click **Search**

Step 7:
Candidates matching the search criteria are listed in **your search results** section of the screen. Select the candidate you wish and click **Add to Order** and then **Continue**

Step 8:
In the **Assign units or assessments to candidates'** area of the screen, candidates' details will be present. In the **product code**/grade column, select **P** (for pass) or **X** (for fail) from the drop down menu. Click **Continue**

Step 9:
In the **checkout** screen, enter your purchase order number or order reference in the **Your PO/Ref** field (This is mandatory). Click **Submit Order** to place the order.

Step 10:
A message box will be displayed, asking if you would like to place the order, click **OK** to place the order.

Step 11:
An order confirmation screen will be displayed confirming your order number. You will have the option to print this confirmation should you wish.

CREATE A RESULTS ENTRY ORDER: A SINGLE UNIT

Introduction
This quick reference guide shows you how to create a results entry order for a full qualification for a candidate in Walled Garden

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Note:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section. (the button for the section you are in will be highlighted in blue).*

Step 2:
Within the Approved qualifications table, select the qualification you want to create a results entry for.

Alternatively, you can search for a qualification by entering the required qualification name or code in the **Search catalogue** field.

Step 3:
If you would like to validate your order, select on the course information page.
Once validated, select **Place an order**

Step 4:
In the Select order type section, select Results entry (the button for the section will be highlighted in blue when selected).

Step 5:
In the search field, you can search for the unit code in the format 0000–000 or select from the units listed below. Click **Continue**

Step 6:
In the candidate selection screen, you can search for existing candidates by selecting the required field from the drop down list. To search by candidate name, select **candidate details** from the list. Enter the candidates' last name (mandatory field) and click **Search**

Step 7:
Candidates matching the search criteria are listed in **your search results** section of the screen. Select the candidate you wish and click **Add To Order** and then **Continue**

Step 8:
In the **Assign units or assessments to candidates'** area of the screen, candidates' details will be present. In the product code/grade column, select from the drop down menu either;
P for pass
X for fail
C for credit
M for merit
D for distinction

Note: ILM customers currently only have the option to select P or X.

Click **Continue**

Step 9:
In the **checkout** screen, enter your purchase order number or order reference in the **Your PO/Ref** field (This is mandatory).
Click Submit Order to place the order.

Step 10:
A message box will be displayed, asking if you would like to place the order, click **OK** to place the order.

Step 11:
An order confirmation screen will be displayed confirming your order number. You will have the option to print this confirmation should you wish.

CANDIDATE MANAGEMENT

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CREATE A NEW CANDIDATE

Introduction
This quick reference guide shows how to create a new candidate in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, select Candidate management from the second navigation bar.

Step 3:
On the **Candidate management** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 4:
In the Candidate management section on the page, select **Create new candidate** and then click Continue

Step 5:
In the **Create candidate** section of the screen, click
Create New Candidate

Step 6:
Enter details for the candidate in the fields shown and then click **Create** (please note that * denotes a mandatory field).

Check the details carefully as this information is used for your candidate's certificate.

Step 7:
A dialogue box will appear confirming that a new candidate has been created and asking if you would like to create another candidate. Select **Yes** or **No** as required.

AMEND A CANDIDATE

Introduction
This quick reference guide shows you how to amend an existing candidate in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, select Candidate management from the second navigation bar.

Step 3:
On the **Candidate management** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 4:
In the **Candidate management** section on the page, select **View / Amend / Print candidate details** and then click **Continue**

Step 5:
In the **Amend / Print Candidate** details of the screen, click the drop down menu in the Select field, and select **Candidate details** from the options presented.

Step 6:
Search for candidate(s) section will appear on the screen. Enter details for the candidate in the fields shown and then click **Search**
*please note that * denotes a mandatory field.*

Step 7:
Candidates matching the search criteria are listed in the **Your search results** area which appears on the screen. Select the required candidate from the list and then click **Candidate Details**

Step 8:
The candidates details will appear on the screen, click **Amend** button at the bottom of the screen.

Step 9:
Make the changes to the candidate details in the **Amend Candidate details** section.

Step 10:
When complete, select the appropriate option from the Reason for Change * drop down menu in and then click **Save**

Check the details carefully as this information is used for your candidate's certificate.

Note: Documentary evidence is required for changes relating to marriage, deed poll, divorce, witness protection or gender re-assignment.

Step 11:
A dialogue box will appear confirming changes made, click **OK** for amendments to be processed.

COHORT MANAGEMENT

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Transfer candidates between cohorts 37

CREATE A NEW CANDIDATE COHORT

Introduction
This quick reference guide shows you how to create a cohort of candidates in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click on **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, select Candidate management from the second navigation bar.

Step 3:
On the **Candidate management** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 4:
In the **Cohort management** section on the page, select **Create new cohort** and then click **Continue**

Step 5:
In the **Select cohort** section on the page, enter a name for the cohort you wish to create.

Step 6:
In the **Select the action you want to perform** section on the page, you can choose to:

- Create a new candidate – click **Create New Candidate** and proceed to **step 7.**
- To add an existing candidate: click the drop down menu in the **Search existing candidate(s) by** field and proceed to **Step 8.**

Step 7:
A dialogue box will appear confirming that a new candidate has been created and asking if you would like to create another candidate. Select **Yes** or **No** as required.

Step 8:
If you are adding an existing candidate click the drop down menu in the Search existing candidate(s) by field. Select the appropriate option you wish to search by from the list and enter details in the fields shown, click **Save** when done.

In the search results area on the page, candidates matching the search criteria are displayed. Select the candidate you wish to add to the cohort and click **Add To Cohort**

If the cohort is now complete, continue to **Step 9.**

Step 9:
When you have completed the required actions to the cohort, click **Save** at the bottom of the screen.

Step 10:
A confirmation message will appear on the screen to say that the cohort has been successfully saved. Click **OK** to complete.

Note: to register the cohort for a qualification, go to Candidate registrations: a cohort of candidates on page 06.

AMEND A CANDIDATE COHORT

Introduction
This quick reference guide shows you how to amend a cohort of candidates in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click on **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, select Candidate management from the second navigation bar.

Step 3:
On the **Candidate Management** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 4:
In the **Cohort management** section on the page, select **Amend existing cohort** and then click **Continue**

Step 5:
In the **Select cohort** section on the page, click the drop down menu in the **Select** field, and select the cohort to be amended from the options presented.

Step 6:
In the **Select the action you want to perform** section on the page, you can choose to:

- Create a new candidate: click **Create New Candidate** and proceed to **Step 7.**

- Add an existing candidate: click the drop down menu in the **Search existing candidate(s) by** field and proceed to **Step 8.**

- Remove candidates: go to **Step 9.**

Step 7:
If you are creating a new candidate, the Create candidate window will appear on the screen.

Enter details for the candidate in the fields shown and then click **Create** (please note that * denotes a mandatory field).

Check the details carefully as this information is used for your candidate's certificate.

If the cohort is now complete, continue to **Step 10.**

Step 8:
If you are adding an existing candidate, select the appropriate option you wish to search by from the drop down list and enter details in the fields shown, click **Search** when done.

In the search results area on the page, candidates matching the search criteria are displayed. Select the candidate you wish to add to the cohort and click **Add To Cohort**

If the cohort is now complete, continue to **Step 10.**

Step 9:
If you wish to remove any candidates from the cohort, select from the list of candidates in the Cohort section of the page. Once selected, click **Update Cohort**

Step 10:
When you have completed the required amendments to the cohort, click **Save** at the bottom of the screen.

Step 11:
A message will appear on screen to say that the cohort has been successfully saved. Click **OK** to complete.

Note: to register the cohort for a qualification, go to Candidate registrations: a cohort of candidates on page 06.

DELETE A CANDIDATE COHORT

Introduction
This quick reference guide shows you how to delete a cohort of candidates in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, select Candidate management from the second navigation bar.

Step 3:
On the **Candidate management** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 4:
In the **Cohort management** section on the page, select Delete existing cohort and then click **Continue**

Step 5:
In the **Select cohort** section on the page, click the drop down menu in the **Select** field, and select the cohort to be deleted from the options presented.

Step 7:
A dialogue box will appear asking you to confirm the deletion made, click **OK** for the deletion to be processed.

Step 8:
A **cohort successfully deleted** message will appear on the screen. Click **OK** to complete.

TRANSFER CANDIDATES BETWEEN COHORTS

Introduction
This quick reference guide shows you how to move a candidate/s, from one cohort to another cohort in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Catalogue** on the first navigation panel.

Step 2:
On the Catalogue page, select Candidate management from the second navigation bar.

Step 3:
On the **Candidate management** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 4:
In the Cohort management section on the page, select **Transfer candidate/s between cohorts** and then click **Continue**

Step 5:
In the **Select cohort 1** section on the page, click the drop down menu in the **Select** field, and select the cohort that you wish to transfer candidates from the options presented.

Step 6:
In the **Select cohort 2** section on the page, click the drop down menu in the **Select** field, and select the cohort that you wish to transfer candidates to, from the options presented.

Step 7:
Select the candidate/s from the list presented in cohort 1 that you wish to transfer and then click Transfer to Cohort 2

Step 7:
Select the candidate/s from the list presented in cohort 1 that you wish to transfer and then click Transfer to Cohort 1

Step 8:
The candidates transferred from cohort 1 will now be displayed in cohort 2.

Step 9:
Click Back To Cohort Management to leave this section.

EDI

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DOWNLOAD RESULTS

Introduction
This quick reference guide shows you how to download a results report from Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Data services** on the first navigation bar.

Step 2:
Select either City & Guilds or ILM from the drop down menu, at the top of the screen, depending on the organisation you wish to download the EDI file for.

Step 3:
In the **Search** section of the screen, select from the **I want to** drop down menu, **Download Enrol / Results / Awards**.

Step 4:
A number of steps will appear on the screen:

- Select the centre for the required download
- Click the **Result** radio button from the options presented
- Select either **Centre-Assessed, E-VOLVE, Multiple choice, Examiner marked** or **All** from the options presented
- Select a file format, **Standard EDI** or **CSV file**
- Specify a reporting period to be shown on the report. This can be done by either selecting from the drop down list in the **for period** field or inputting a **From / To** period.

Once all these steps have been completed, click **Search**

Step 5:
Click **Download** to open the **File Download** screen.

Step 6:
A pop-up window will open at the base of the page asking if you would like to **Open, Save** or **Cancel**. Select option as required.

Step 7:
When completed, click  on the first navigation bar to return to the **Homepage**.

TRACK EDI FILES

Introduction
This quick reference guide shows you how to track the status of uploaded EDI files on Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Data services** on the first navigation bar.

Step 2:
Select either City & Guilds or ILM from the drop down menu depending on the organisation you wish to upload the EDI file for.

Step 3:
In the **Search** section of the screen, select **Track EDI files** from the **I want to** drop down menu.

Step 4:
A number of steps will appear on the screen.

- Select the appropriate centre you wish to track the status for
- Enter the date range you wish to search for (*note: dates should be entered in the format dd.mm.yyyy)*
- Select the file status from the drop down list.

When completed, click **Search**

Step 5:
The status of the files uploaded in the specified time period are now displayed. To display the results for a particular time upload, click on the filename in the **File ID** column.

Step 6:
The results of the upload are displayed in the **Your search results** area of the screen.

Note: if the file status is green, then this record has been successfully processed. If any records were still being processed, the file status would be yellow and the number of records would be shown in the ***In Process*** *column.*

Step 7:
When completed, click  on the first navigation bar to return to the **Homepage**.

UPLOAD EDI FILES

Introduction
This quick reference guide shows you how to upload an EDI file onto Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Data services** on the first navigation bar.

Step 2:
Select either City & Guilds or ILM from the drop down menu depending on the organisation you wish to upload the EDI file for.

Step 3:
In the Search section of the screen, select **Upload EDI files** from the **I want to** drop down menu.

Ensure you select the appropriate centre you wish to upload the file for and then click **Search**

Step 4:
In the **File upload** section of the screen, click **Browse** to locate the EDI file that you wish to upload.

Step 5:
Select the EDI file you wish to upload and then click **Upload**

Step 6:
A confirmation message will be displayed confirming that the file has been successfully uploaded and is being processed.

To track the status of the EDI file, see **Track EDI files** section (page 42).

E-VOLVE

(City & Guilds customers only)
Schedule an e-volve exam 46

SCHEDULE AN E-VOLVE EXAM

Please note: this is for customers that work with City & Guilds only

Introduction
This quick reference guide shows you how to schedule an e-volve examination in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, click e-volve scheduling from the second navigation bar.
Note:
- *If you are a main centre, ensure that you are viewing the correct sub centre*
- *Ensure that you have selected City & Guilds from the organisation list.*

Step 3:
In the **candidate selection** area, you can search for existing candidates by selecting the required field from the drop down list.

Step 4:
Candidates matching the search criteria are listed in your search results section of the screen. Select the candidate you wish and click **Add To Order** and then **Continue**

Step 5:
The **Unit or assessment selection** area enables you to enter the following details for each candidate:

Qualification – follow **step 6**
Assessment – follow **step 7**
Date and time of booking – follow **step 8**
Installation ID – follow **step 9**
Optional time extension – follow **step 10**
Optional alternative location – follow **step 11**

Note for step 6 and 7:
If all the candidates in the list are to be scheduled for the same exam, enter qualification and assessment for the first one and click the 'All same' checkbox at the top of the assessment column. This will copy the same qualification and assessment to all the learners who are eligible.

Step 6:
Against each learner, there is a drop down list in the **Qualification** column which enables you to select the qualification you wish to test the learner on. A qualification will only appear on the list if:
- The learner has a valid registration for the qualification or the qualification does not require registration (such as navigation exams)
- The qualification contains one or more on-screen assessments

Select the appropriate qualification from the list.

Step 7:
Once the qualification is selected, the next drop down box will be populated with the relevant assessment for that qualification. Select the assessment that is to be scheduled.

Note:
- *If a learner is to be booked for more than one assessment, click the plus sign (+) in the Add Exam column to create a new line for them. New lines created in this way will show a minus sign (–) in this column, which will remove the line if clicked.*

Having now chosen the learners, qualifications and assessments to be scheduled you can now enter the scheduling details.

Step 8:
Click on the date column and the scheduled date of the exam can be typed in or entered via the popup calendar. Dates in Walled Garden are displayed in the format dd.mm.yyyy.

The scheduled time is entered in the next column using a dropdown list giving a choice of times at 30 minute intervals.

Note:
- *Exams can be booked at least 30 minutes prior to the scheduled exam time and up to six months in the future.*
- *You can schedule overlapping exams for a learner, as long as there is a 30 minute gap between starting times.*
- *Exams will be available to be sat at any time during the exam window. The window starts 10 days before the scheduled exam date (or immediately if the exam was booked less than 10 days in advance). The window closes 30 days after the scheduled exam date. These limits apply for all exam types.*

Step 9:
In this field, you must select an Installation ID to use for the delivery of the exam in SecureAssess. You may have only one or several Centre Installations, depending on your e-volve account configuration. The results will all go to the City & Guilds Centre Number that booked the exam, and they will appear in the 'Candidate History' report as usual, regardless of which Installation ID was used. The Installation ID must be selected for each exam booking. Often this will be the same for all bookings so just select on the first line and then click the 'All same' checkbox.

Note:
If the Installation ID you wish to use does not appear in the dropdown list, this could be because:
- *The information may not have been updated in Walled Garden*
- *The information may be assigned to a different City & Guilds Centre or sub centre*
- *You may need to apply for a new one.*

Step 10:
Click **Show** against a booking in the **Additional Details** column to display the additional fields for the time extensions:
- Time extension percentage
- Time extension reason.

To apply for a time extension, the percentage time and the reason must both be selected. The maximum selectable percentage is 25% for most exams (50% in some cases, including UKT/EKUs).

To apply a greater time extension (up to 100%), you must apply to the Policy Team at City & Guilds with the necessary evidence and obtain a reference number from them.

Step 11:
Click **Show** against a booking in the **Additional Details** column to display the additional field for alternative location.

Where a exam is to be taken offsite, the address should be entered in the **Alternative Location** field for that booking. This can be used instead of sending a notification email to the Policy Team at City & Guilds. Exams must only be administered at appropriate locations and follow the City & Guilds policy – this can be found at www.cityandguilds.com/policy.

Step 12:
Once all required fields have been completed, click **Continue**

Step 13:
In the **checkout** screen, enter your purchase order number or order reference in the **Your PO/Ref** field (This is mandatory).
Click **Submit Order** to place the order.

Step 14:
A message box will be displayed, asking if you would like to place the order, click **OK** to place the order.

Step 15:
An order confirmation screen will be displayed confirming your order number. You will have the option to print this confirmation should you wish.

LOGO HANDLING
(ILM customers only)

Display additional certificate text 51
Display logo 52
Upload additional certificate text 53
Upload logo 54

DISPLAY ADDITIONAL CERTIFICATE TEXT

Please note: this is for customers that work with ILM only

Introduction
This quick reference guide shows you how to display the status of additional certificate text which has been uploaded into Walled Garden for approval.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Settings** on the first navigation bar.

Note:
- *Ensure that you select ILM from the organisation drop down list*
- *If you are a main centre, ensure that you select the correct sub centre.*

Step 2:
On the **Settings** page, click Logo handling on the second navigation bar.

Step 3:
In the **Search** area of the screen, select **Display Texts** from the drop down list. You will then be presented with the option to display;
- Approved texts
- Texts waiting for approval
- All texts.

Select the required option and click **Search**

Step 4:
You will be presented with texts according to the option selected.

DISPLAY LOGO

Please note: this is for customers that work with ILM only

Introduction
This quick reference guide shows you how to display the status of a logo which has been uploaded into the in the Walled Garden for approval.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Settings** on the first navigation bar.

Note:
- *Ensure that you select ILM from the organisation drop down list*
- *If you are a main centre, ensure that you select the correct sub centre.*

Step 2:
On the **Settings** page, click Logo handling on the second navigation bar.

Step 3:
In the **Search** area of the screen, select **Display logos** from the drop down list. You will then be presented with the option to display;
- Approved logos
- Logos waiting for approval
- All logos.

Select the required option and click **Search**

Step 4:
You will be presented with texts according to the option selected.
To preview the logo, click  in the preview column.

UPLOAD ADDITIONAL CERTIFICATE TEXT

Please note: this is for customers that work with ILM only

Introduction
This quick reference guide shows you how to upload additional certificate text for use on an endorsed or development programme certificate into the Walled Garden for approval.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Settings** on the first navigation bar.

Note:
- *Ensure that you select ILM from the organisation drop down list*
- *If you are a main centre, ensure that you select the correct sub centre.*

Step 2:
On the **Settings** page, click on the second navigation bar.

Step 3:
In the **Search** area of the screen, select **Upload texts** from the drop down list and click **Search**

Step 4:
Insert the required text into the **Additional CERT text** field and click **Confirm**

Note: A maximum of 120 characters are allowed.

Step 5:
A confirmation message will appear on screen to say that the text has been uploaded successfully. It will be available for registration upon approval.

UPLOAD LOGO

Please note: this is for customers that work with ILM only

Introduction
This quick reference guide shows you how to upload a logo for use on an Endorsed or Development programme certificate in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Settings** on the first navigation bar.

Step 2:
On the **Settings** page, click Logo handling on the second navigation bar.

Note:
- *Ensure that you select ILM from the organisation drop down list*
- *If you are a main centre, ensure that you select the correct sub centre.*

Step 3:
In the Search area of the screen, select **upload logos** from the drop down list and click **Search**

Step 4:
Click **Browse** and navigate to the required file. Select the required logo to upload and click **open.**

Note: the file requirements which are displayed on the screen (File type: JPEG / File size: between 350–375 pixels / Resolution: 300dpi).

Step 5:
The system will display the logo. Ensure that this is the correct logo and click **Confirm**

Note: the logo will be submitted to ILM for approval and will not be available to add to a certificate until approved.

ON-DEMAND
(City & Guilds customers only)

Create a named On-Demand exam 56

CREATE A NAMED ON DEMAND EXAM

Please note: this is for customers that work with City & Guilds only

Introduction
This quick reference guide shows you how to raise a named On Demand exam in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Catalogue** on the first navigation bar.

Note:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *Ensure that you are in the **Show approved** section (Orders can be made from **My Favourites** and **Frequently Ordered Products** as well should you wish). The button for the section you are in will be highlighted in blue.*

Step 2:
In the **Search catalogue** bar, enter the qualification name, qualification number or QAN number you wish to place an order for.

Notes:
- *Ensure that you select City & Guilds from the organisation drop down list.*

Step 3:
Select the qualification from the list displayed that you wish to place an order for and you will then be taken to the qualification page.

Note:
- *The last registration date needs to be green in order to place an order.*

Step 4:
Click the **Place an order** button.

Step 5:
In the **Select order type** section, click On Demand. This will be highlighted in blue when selected.

Step 6:
In the **Unit or Assessment available** section of the screen, select the assessment/s that you wish to place an order for.

Enter the date and time of the exam and the quantity of the candidates in the appropriate fields. Click **Continue**

Note:
- *The chosen exam date must be at least 14 days from the date of the order.*

Step 7:
On the **Candidate selection** section, select **Single enrolment no.** from the drop down list.

Step 8:
Search for Candidates will now appear on the screen, enter the enrolment number into the search field, and click **Search**

Step 9:
The required candidates details will appear on the screen, click **Update Order**. Repeat step 8 until all candidates have been added to the order. Once all candidates have been added, click **Continue**

Step 10:
On the candidate selection screen, select the required assessment by ticking the relevant product code. Click **Continue**

Step 11:
In the **Order reference and delivery** area of the **Checkout** screen, enter your order reference or purchase order into the free text field. This is mandatory. Click **Submit Order**

Step 12:
A confirmation message will appear on the screen. Click **OK** to continue.

Step 13:
An order confirmation screen is displayed, confirming the order number, qualification details, candidates and cost. You can print a copy of the order by selecting **Print Page** at the bottom of the screen.

ORDERING MATERIALS

Search for and order publications and merchandise 60

SEARCH FOR AND ORDER PUBLICATIONS AND MERCHANDISE

Introduction
This quick reference guides shows you how to search and place an order for publications or merchandise in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Catalogue** on the first navigation bar.

Step 2:
On the **Catalogue** page, select Publications & merchandise from the second navigation bar.

Note:
- *If you are a main centre, ensure that you are viewing the catalogue for the correct sub centre you wish to make an order for*
- *If you work with both City & Guilds and ILM, select the appropriate organisation from the drop down menu.*

Step 3:
In the **Publications, merchandise and publicity** section of the screen, search for publications and merchandise by product code or keyword. Click **Search**

Step 4:
A list of publications and merchandise matching your search criteria will be displayed. Select from the list, adding the quantity of the required item in the appropriate **Qty** column. Click **Continue**

Step 5:
In the **Order reference and delivery** area of the **Checkout** screen, enter your order reference or purchase order number into the free text field. This is mandatory. Click **Submit Order**

Step 6:
A confirmation message will appear on the screen. Click **OK** to continue.

Step 7:
An order confirmation screen is displayed. You can print a copy of the order by selecting **Print Page** at the bottom of the screen.

SETTINGS

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LOGIN AND HOMEPAGE

Introduction
This quick reference guide highlights the features on the log in screen and homepage on Walled Garden.

LOGIN SCREEN

To log in:
- Log in using your **email address** (user name) and **password**
- Tick the box to indicate that you have read and accepted Terms and Conditions. An error message will appear if you do not tick to accept the Terms and Conditions and you will not be able to log in until they are accepted.

Problems logging in?
Click on problems logging in at the bottom of the login screen. You will be presented with two options;

Option 1 – Reset your password
Enter your email address and click submit. You will be sent an email with instructions and links to reset your password. You should receive this email within 15 minutes.

Option 2 – Contact us
- Please select your country from the drop down menu
- The appropriate contact telephone and email address for your country will be displayed
- Select whether you are an ILM or City & Guilds customer. If you work with both ILM and City & Guilds, then choose either.

Alternatively, visit either the ILM or City & Guilds website where additional information regarding problems logging in can be found.

HOMEPAGE

On the homepage you will find:

1. Header bar

Here you can see

- If you are a centre that works with either ILM or City & Guilds then you will see the respective logo in the top left hand corner of the screen. If your centre works with both ILM and City & Guilds then both logos will be present.
- Your personal details – Name / Centre / Customer ID / Centre ID – will be found in the top right hand corner of the screen
- An option to log out of Walled Garden will be visible under your personal details.

Note: you will be automatically logged out after 8 hours, so we recommend that you always log out of a session

- A cog wheels symbol (⚙) in the top right hand corner of the screen which will take you to your user settings (go to page 66 for more information about user settings).

Note: the header bar is always visible no matter where you are in the site.

2. First line navigation bar

Here you will have the following options.

HOME	Returns you back to the homepage wherever you are in the site.
CATALOGUE	View qualifications, place orders and use the Rules of Combination calculator.
DATA SERVICES	If your centre submits your orders via our EDI (Electronic Data Interchange) system, then you would use this area of Walled Garden to place orders.
REPORTS	View and download various reports.
SETTINGS	View your centre settings and Walled Garden accounts.

SHOPPING BASKET ICON	If you have a saved order, a value will be displayed in the icon. If you click through you will see your saved order. Note: this is always visible throughout the site.
QUALITY	Manage your quality assurance activities and qualification approvals. Note: This tab can only be seen if you have an add on Quality profile.

3. Carousel

This provides you with updates and information regarding products and services. The carousel will scroll automatically or you can click through it using the right and left arrows. You can click on any of these updates (hover over the link in the red box) and this will take you to the relevant page.

4. Focus Alerts

Note: these will only be visible to centres which work with City & Guilds

- These are communication alerts regarding the industries and qualifications to which you have signed up to.
- To view all: use the arrow keys at the side of the bar.
- To read more on each item: click read more (the blue bar).

5. News and Updates

Note: this will only be visible for centres which work with ILM

This section will keep you up to date with the latest news and developments from ILM.

6. Widgets

Here you will see widgets for:

- **Help and support**: This will give you information of where to go for help and support
- **Sign up for focus alerts:** Sign up to our centre preferences to stay up to date with qualifications and products (Only for centres that work with City & Guilds)
- **Contact us:** For any queries regarding Walled Garden.

7. Alerts

These will be displayed in red at the top of the page to alert you to any maintenance taking place on Walled Garden or any issues with your account.

PERSONAL USER MANAGEMENT

Introduction
This quick reference guide shows you how to update your own information within Walled Garden.

Step 1:
Log in to Walled Garden and on the Homepage, click on the  icon in the top right hand corner of the screen.

Step 2:
You will be presented with a pop up box, which contains three sections; **Your profile, Security** and **Help.**

Step 3:
To update your personal details, select the **Your profile** tab and follow **Step 4.**

To update your password, select the **Security** tab and follow **Step 5.**

To view contacts available to you, select the **Help** tab and follow **Step 6.**

Step 4
In the **Your profile** section, you will find your personal details. A red asterisk denotes mandatory fields to be completed.

Once changes have been made, click **Save changes**

Step 5.
In the **Security** section, you can change your password.

Enter your current password, followed by your new password. Once the change has been made, click **Save changes**

Note:
Your password must NOT:
- *Begin with an exclamation mark (!) or a question mark (?)*
- *Begin with the same 2 characters*
- *Be the same as your previous 5 passwords*
- *Be comprised entirely of numbers.*

Your password:
- *MUST be between six and eight characters in length*
- *IS case sensitive.*

Step 6.
In the Help section, you will find the following information.

- **Centre:** If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre. If you are **not** a main centre then you will only see your centres ID.

- **Primary user/s:** Here you will find contact details for your centres primary user/s.

Note: The Primary User is the main contact for your centre. They will be responsible for the creation of additional centre users and subsequently viewing/amending their details. This will typically be an Exams Officer.

- **Customer Services:** If you work with both ILM and City & Guilds, you can select either organisation to view contact details for relevant Customer Services or Business Manager. The relevant organisation will be highlighted in blue when selected.

- The **Contact us** button will take you to the relevant website for further contacts.

CENTRE DETAILS

Introduction
This quick reference guide highlights the features in centre details on Walled Garden. This is a new feature.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Settings** on the first navigation bar.

Step 2:
Ensure that you are in **Centre settings** on the second navigation bar – this will be highlighted in bold. You are automatically directed here.

Note:
- *If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre on this page. This option will only be visible at main centre level only.*
- *If your centre works with both ILM and City & Guilds then you will be able to select between the two. The button will turn blue when selected.*

Step 3:
In **Centre settings,** select the CENTRE DETAILS tab.

This section contains address details for your centre, billing, question papers and delivery of materials. All users can view these details, but only the following user profiles can edit:

Primary user:	Edit all address fields.
Secondary user:	Edit delivery address ONLY.
Finance user:	Edit billing address ONLY.

Step 4:

To edit a centre address	–	follow **Steps 5 to 7**
To edit a delivery address	–	follow **Steps 8 to 11**
To create a new delivery address	–	follow **Steps 12 to 14**
To delete a delivery address	–	follow **Steps 15 to 17**

In the Centre address section of the screen, click on **Edit address** next to the address box you wish to edit

- In upload EDI section, please can you change the below highlighted (choose file) to a blue button that says Browse.

Step 6:
You will be presented with a pop up screen with address fields to edit. A red asterisk denotes mandatory fields to complete.

Note:
- If your centre works with both City & Guilds and ILM you will have the option to apply these changes to both by checking the tick box ***'Apply changes to all sales organisations'*** under the address details.

Step 7:
Once you have entered address details, click the **Save changes** save changes button at the bottom of the screen.

You will get an onscreen notification as well as an email confirming that the change request has been received. This change will take up to five working days to be updated and you will receive an email notification when this has been approved.

Step 8:
To edit a delivery address, scroll down to the **Delivery address** section of the screen where you will have the option to edit, delete or enter a new address.

Step 9:
To edit, click the **Edit** box next to the address that you wish to edit.

Step 10:
You will be presented with a pop up screen, with address fields to edit. Red asterisk denotes mandatory fields.

Note:
- *If you would like this to be your centres default delivery address then ensure that the box under address details is ticked*
- *If your centre works with both City & Guilds and ILM, you will have the option to apply this address to both by ticking the box below the address details.*

Step 11:
Once you have entered address details, click **Save changes**. You will get an onscreen confirmation message as well as an email confirming that the change request has been received. This change will take up to 15 minutes to come into effect.

Step 12:
To create a new delivery address, click **Enter a new address** under the address bar.

Step 13:
You will be presented with a pop up screen, with address fields to complete. A red asterisk denotes mandatory fields.

Note:
- *If you would like this to be your centres default delivery address then ensure that the box under address details is ticked*
- *If your centre works with both City & Guilds and ILM, you will have the option to apply this address to both by ticking the box below the address details.*

Step 14:
Once you have entered address details, click **Create address** at the bottom of the screen. You will get an onscreen confirmation message as well as an email confirming that the change request has been received. This change will take up to 15 minutes to come into effect.

Step 15:
Once you have entered address details, click **Save changes**. You will get an onscreen confirmation message as well as an email confirming that the change request has been received. This change will take up to 15 minutes to come into effect.

Step 16:
To create a new delivery address, click **Enter a new address** under the address bar.

Step 17:
You will be presented with a pop up screen, with address fields to complete. A red asterisk denotes mandatory fields.

Note:
- *If you would like this to be your centres default delivery address then ensure that the box under address details is ticked*
- *If your centre works with both City & Guilds and ILM, you will have the option to apply this address to both by ticking the box below the address details.*

Step 18:
Once you have entered address details, click **Create address** at the bottom of the screen. You will get an onscreen confirmation message as well as an email confirming that the change request has been received. This change will take up to 15 minutes to come into effect.

Step 19:
To delete a delivery address, click the grey **x** box, next to the address you wish to delete.

Step 20:
A pop up message will appear asking you to confirm that you would like to delete this address. Click **OK** to delete.

Step 21:
You will get an onscreen confirmation message as well as an email confirming that the deletion request has been received. This change will take up to 15 minutes to come into effect.

While the deletion is pending, the address will be highlighted in pink on the address list box.

CENTRE PREFERENCES

Introduction
This quick reference guide highlights the features in centre preferences on Walled Garden. This section contains options around certification and invoicing for your centre, which is a new feature.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Settings** on the first navigation bar.

Step 2:
Ensure that you are in **Centre settings** on the second navigation bar, this will be highlighted in bold. (You are automatically directed here).

Note:
- *If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre. This option will be visible at main centre level only.*
- *If your centre works with both City & Guilds and ILM, then you will be able to select between the two. The button will turn blue when selected.*

Step 3:
Select the CENTRE PREFERENCES tab. This will turn grey when selected.

All users will be able to view these details, but only the following user profiles can edit:

Primary user:	Can edit all fields
Finance user:	Can edit invoicing field ONLY

Step 4:
In **Centre Preferences** you will have the following options:

INVOICING	You will have the option to select how you receive invoices and how often from the drop down lists.
CERTIFICATES	From the drop down list, you will have the option to request how often certificates should be sent to you.
CERTIFICATE OF UNIT CREDIT OPT IN/OUT	You will have the option to select whether you would like certificate of units to be printed on certificates.
RESULTS LIST	You will have the option to select if you wish to receive the candidate results list along with the certificates.
NOTIFICATION OF CANDIDATE RESULTS ON/OFF	You will have the option to select if you wish to be notified when students have failed in a certification.

Step 5:
Once selections have been made, click **Save changes** at the bottom of the screen.

MANAGE WALLED GARDEN USERS: ADD A NEW USER

Introduction
This quick reference guide shows you how to update your centre's Walled Garden users.

Please note: these details can only be viewed and updated by your centre's primary user.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Settings** on the first navigation bar.

Step 2:
In **Centre settings,** select the MANAGE USERS tab.

Note:
- *If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre on this page. This option will only be visible at main centre level*
- *If your centre works with both ILM and City & Guilds then you will be able to choose between the two. The button will turn blue when selected.*

Step 3:
Click **Add user** in the top right hand corner.

Step 4:
A pop up box will appear with **Add new user** information fields to complete. A red asterisk denotes mandatory fields.

City & Guilds customers will also be able to select a Quality add on profile from the drop down menu selection.

Step 5:
Once all fields have been completed, click at the bottom of the screen.

Step 6:
A confirmation message will appear confirming receipt of the change. Updates will be applied within 24 hours.

Note:

- *Each centre can have a maximum of **two** Primary Users. If you exceed this, an alert will pop up on screen once you click **create user***
- *The email address that is entered must be unique. If an email address has been used previously, an alert will pop up on screen once you click **create user***
- *More information regarding what access each of the user profiles provides can be found when you hover over the **more info** text under each profile*
- *In **Job title** field, if none of the options provided match the job title, select **other** from the list and a free text field will appear allowing you to enter the job title required.*

MANAGE WALLED GARDEN USERS: EDIT AN EXISTING USER

Introduction
This quick reference guide shows you how to update your centre's Walled Garden users.

Please note: these details can only be viewed and updated by your centre's primary user.

Step 1:
Log in to Walled Garden and on the **Homepage,** click **Settings** on the first navigation bar.

Step 2:
In **Centre settings,** select the tab MANAGE USERS

Note:
- *If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre on this page. This option will only be visible at main centre level*
- *If your centre works with both ILM and City & Guilds then you will be able to select between the two. The button will turn blue when selected.*

Step 3:
Click the **Edit** button next to the user you wish to edit.

Step 4:
A pop up box will displayed with **Edit existing user** information fields to complete. A red asterisk denotes mandatory fields.

If your centre works with City & Guilds in the UK, you will be able to select a Quality add on profile from a drop down menu selection.

Step 5:
Once all fields have been completed, click **Save changes** at the bottom of the screen.

Step 6:
A confirmation message will appear confirming receipt of the change. Updates will be applied within 24 hours.

Both the user whose details have been changed and the Primary User will receive a confirmation email.

Step 7:
The user will be highlighted in pink on the list of users while this change is pending.

Note:
- *Text is case sensitive*
- *In job title field, if none of the options provided match the job title, select **other** from the list and a free text field will appear allowing you to enter the job title required.*

MANAGE WALLED GARDEN USERS: DELETE A USER

Please note: these details can only be viewed and updated by your centre's primary user.

Introduction
This quick reference guide shows you how to update your centre's Walled Garden users.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Settings** on the first navigation bar.

Step 2:
In **Centre settings,** select the MANAGE USERS tab.

Note:
- *If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre on this page. This option will only be visible at main centre level*
- *If your centre works with both ILM and City & Guilds then you will be able to select between the two. The button will turn blue when selected.*

Step 3:
Click on the **x** in the grey box next to the user you wish to delete.

Step 4:
You will be presented with a pop up box asking you to confirm the deletion. Click **OK** to delete.

Step 5:
A confirmation message will appear on screen confirming receipt of the deletion. Updates will be applied within 24 hours.

The deleted Walled Garden will receive a confirmation email.

Step 6:
The user will be highlighted in pink and the text struck through on the list of users while this change is pending.

MANAGE WALLED GARDEN USERS: LOCK OR RE-INSTATE A LOCKED USER

Please note: these details can only be viewed and updated by your centre's primary user.

Introduction
This quick reference guide shows you how to update your centre's Walled Garden users.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Settings** on the first navigation bar.

Step 2:
In **Centre settings,** select the MANAGE USERS tab.

Note:
- *If you are a main centre, you will have the option to select your sub centre to view relevant information for that centre on this page. This option will only be visible at main centre level*
- *If your centre works with both ILM and City & Guilds then you will be able to select between the two. The button will turn blue when selected.*

Step 3:
To lock a user – follow **Steps 4 to 8**
To re-instate a user – follow **Steps 9 to 12**

Step 4:
Click **Edit** next to the user you wish to lock.

Step 5:
An **Edit existing user** pop up box will appear. Click **Lock user** at the bottom of the screen.

Step 6:
You will be presented with a pop up message box, asking you to confirm that you wish to proceed with the request. Click **OK** to continue.

Step 7:
Click **Save changes** to apply this change. This will have immediate effect.

Step 8:
A 🔒 will appear next to the user you have locked on the list of users.

Step 9:
To re-instate a user, click **Re-instate** next to the user you wish to re-instate.

Step 10:
You will be presented with a pop box asking you to confirm their re-instatement. Click **OK** to confirm.

Step 11:
A second box will appear asking if you would like to reset this user's password. If you select:

OK – an email will be sent to the user with instructions on how to reset their password

Cancel – the user's original password will be active.

Step 12:
While the re-instatement is pending, the user will be highlighted in pink until the change has been made.

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ORDER REPORTS: CERTIFICATE ORDERS REPORT

Introduction
This quick reference guide shows you how to display a report of certificate orders on Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Orders from the second navigation bar.

On the **Orders** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Orders** page, in the **Search** area of the screen, click the drop down menu in the **with** field, and select **Certificates** from the options presented.

Specify a reporting period. Note that the **for period** defaults to 'The last year'. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
Results are displayed at the base of the **Search** area screen.
The list of results is headed **Search Result: XX Orders found.**

To display a Certificate orders report click on the (underlined) Order number shown in the **Order No.** column.

Step 5:
The selected order is now displayed on the right of the screen. Order tracking information can be displayed by clicking on  in the **Order Tracking** column under Order lines

Step 6:
Order tracking is now displayed under Selected line order tracking

Step 7:
If you wish to display the related invoice, click on the invoice number (underlined) displayed in the Reference column.

Step 8:
Click  on the first navigation bar to return to the **Homepage.**

ORDER REPORTS: NAMED REGISTRATION ORDERS REPORT

Introduction
This quick reference guide shows you how to run Named Registration Orders reports in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Orders from the second navigation bar.

On the **Orders** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Orders** page, in the **Search** area of the screen, click the drop down menu in the **with** field and select **Named Registration** from the options presented. Click in the **for qualification** field and enter a qualification code.

Specify a reporting period. Note that the **for period** defaults to 'The last year'. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
Results are displayed at the base of the **Search** screen. The list of results is headed **Search Result: XX Orders found.**

To display a qualification approval order, click on the order number (underlined) shown in the **Order No.** column.

Step 5:
The selected order is now displayed on the right of the screen. Order tracking information can be displayed by clicking on  in the **Order Tracking** column under **Order lines**

Step 6:
Order tracking is now displayed under **Selected line order tracking**

Step 7:
If you wish to display the related invoice, click on the invoice number (underlined), displayed in the **Reference** column.

Step 8:
Click  on the first navigation bar to return to the **Homepage.**

ORDER REPORTS: PUBLICATION AND MERCHANDISE ORDER REPORT

Introduction
This quick reference guide shows you how to run a publication and merchandise orders report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Orders from the second navigation bar.

On the **Orders** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Orders** page, in the **Search** area of the screen, click the drop down menu in the **with** field and select **Publications and Merchandise** from the options presented.

Specify a reporting period. Note that the **for period** defaults to 'The last year. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
Results are displayed at the base of the Search area screen. The list of results is headed **Search Result: XX Orders found.**

To display a Publications and Merchandise report click on the order number (underlined) shown in the **Order No.** column.

Step 5:
The selected order is now displayed on the right of the screen. Order tracking information can be displayed by clicking on  in the **Order Tracking** column under **Order lines**

Step 6:
Order tracking is now displayed under **Selected line order tracking**

Step 7:
If you wish to display the related invoice, click on the invoice number (underlined) displayed in the **Reference** column.

Step 8:
Click  on the first navigation bar to return to the **Homepage.**

ORDER REPORTS: REPLACEMENT CERTIFICATE REPORT

Introduction
This quick reference guide shows you how to display a report of replacement certificate orders on Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Orders from the second navigation bar.

On the **Orders** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Orders** page, in the **Search** area of the screen, click the drop down menu in the **with** field and select **Replacement Certificates** from the options presented.

Specify a reporting period. Note that the **for period** defaults to 'The last Year. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
Results are displayed at the base of the **Search** screen.
The list of results is headed **Search Result: XX Orders found.**

To display a **results entry report**, click on the order number (underlined) shown in the **Order No.** column.

Step 5:
The selected order is now displayed on the right of the screen. Order tracking information can be displayed by clicking on  in the **Order Tracking** column under **Order lines**

Step 6:
Order tracking is now displayed under **Selected line order tracking**

Step 7:
If you wish to display the related invoice, click on the invoice number (underlined) displayed in the **Reference** column.

Step 8:
Click  on the first navigation bar to return to the **Homepage.**

ORDER REPORTS: RESULTS ENTRY ORDERS REPORT

Introduction
This quick reference guide shows you how to run a results entry orders report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select **Orders** from the second navigation bar.

On the **Orders** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Orders** page, in the **Search** area of the screen, click the drop down menu in the **with** field and select **Results Entry** from the options presented. Click in the **for qualification** field and enter a qualification code.

Specify a reporting period. Note that the **for period** defaults to 'The last year'. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
Results are displayed at the base of the **Search** screen. The list of results is headed **Search Result: XX Orders found.**

To display a results entry report click on the order number (underlined) shown in the **Order No.** column.

Step 5:
The selected order is now displayed on the right of the screen. Order tracking information can be displayed by clicking on  in the **Order Tracking** column under **Order lines**

Step 6:
Order tracking is now displayed under **Selected line order tracking**

Step 7:
If you wish to display the related invoice, click on the invoice number (underlined) displayed in the **Reference** column.

Step 8:
Click  on the first navigation bar to return to the **Homepage.**

ORDER REPORTS
QUALIFICATION APPROVALS REPORT

Introduction
This quick reference guide shows you how to display a report of qualification approval orders on Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select **Orders** from the second navigation bar.

On the **Orders** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Orders** page, in the **Search** area of the screen, click the drop down menu in the **with** field and select **Qualification approvals** from the options presented.

Specify a reporting period. Note that the **for period** defaults to 'The last year'. If you wish to change the period to be shown on the report, click in the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
Results are displayed at the base of the **Search** screen.
The list of results is headed **Search Result: XX Orders found.**

To display a qualification approval order, click on the order number (underlined) shown in the **Order No.** column.

Step 5:
The selected order is now displayed on the right of the screen. Order tracking information can be displayed by clicking on  in the **Order Tracking** column under **Order lines**

Step 6:
Order tracking is now displayed under **Selected line order tracking**

Step 7:
If you wish to display the related invoice, click on the invoice number (underlined), displayed in the **Reference** column.

Step 8:
Click  on the first navigation bar to return to the **Homepage.**

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CANDIDATE / RESULTS REPORT: CANDIDATE HISTORY REPORT

Introduction
This quick reference guide shows you how to run a candidate history report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Candidate results from the second navigation bar.

On the **Candidate results** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Candidate results** page, in the **Search** area of the screen, note that the **Show me** field defaults to **Candidate History.**

Note: For this search, an ENR number OR ULN OR first name, last name, date of birth and gender are mandatory, along with a reporting period.

Specify a reporting period. Note that **for period** defaults to 'The last week'. If you wish to change the period to be shown on the report, click in the drop down in the **for period** field. You can also report using **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
The search results are now displayed on the right of the screen under **Candidate History**

Step 5:
Click ◀ to hide the **Search** area of the screen to ensure all columns of the report are displayed.

Step 6:
To display the full history of a candidate, click on the ■ in the **Select** column.

Step 7:
The full candidate history is now displayed under
Selected candidate history details

Step 8:
Click ⌂ on the first navigation bar to return to the **Homepage.**

CANDIDATES / RESULTS REPORT: CERTIFICATION LISTING REPORT

Introduction
This quick reference guide shows you how to run a certification listing report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Candidate results from the second navigation bar.

On the **Candidate results** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
In the **Search** area of the screen, select **Certification Listing** from the options presented in the **Show me** field.

Step 4:
If you are a main centre, select the appropriate sub centre from the drop down list from **which belongs to centre** field.

Step 5:
Enter the qualification code which is six digits long in the **for Qualification.**

Step 6:
Specify the reporting period that you require.

*Note: Here you can choose to complete either **for period**, **or since** or **From / To** fields to complete.*

Step 7:
When you have entered your search criteria, click **Search**

Step 8:
The search results are now displayed on the right hand side of the screen, under **Candidate listing – Certification**

Step 9:
Click ◀ to hide the **Search** area of the screen, to ensure all columns of the report are displayed.

Step 10:
Choose the required certificate by clicking on the ■ button in the **Select** column.

Step 11:
The results are displayed under the Candidate List

Step 12:
Click ⌂ the first Navigation bar to return to the Homepage.

CANDIDATES / RESULTS REPORTS: NEW CANDIDATE REPORT

Introduction
This quick reference guide shows you how to run a new candidates report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Candidate results from the second navigation bar.

On the **Candidate results** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Candidate results** page, in the **Search** area of the screen, click the drop down menu in **Show me** field and select **New Candidates** from the options presented.

Note: For this search an ENR number OR ULN OR first name, last name, date of birth and gender are mandatory, along with a reporting period.

Specify a reporting period. Note that the **for period** defaults to 'The last week'. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date or a **From / To** period.

When you have entered your search criteria, click **Search**

Step 4:
The results of the search are now displayed on the right of the screen under **New candidates**

Step 5:
Click on ◀ to hide the **Search** area of the screen to ensure all columns of the report are displayed.

Step 6:
Click on the first navigation bar to return to the **Homepage.**

WALLED GARDEN REPORTS
QUALIFICATION RESULTS LIST

Introduction
This quick reference guide shows you how to run a qualification results report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage**, click **Reports** on the first navigation bar.

Step 2:
On the Reports page, select Candidate results from the second navigation bar.

On the **Candidate results** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
In the **Search** area of the screen, select **Qualification Results List** from the options presented in the **Show me** field.

Step 4:
If you are a main centre, select the appropriate sub centre from the drop down list from **which belongs to centre** field.

Step 5:
Enter the qualification code which is six digits long in the **for Qualification.**

Step 6:
Specify the reporting period that you require.

*Note: Here you can choose to complete either **for period**, **or since** or **From / To** fields to complete.*

Step 7:
When you have entered your search criteria, click **Search**

Step 8:
The search results are now displayed on the right hand side of the screen, under **Results listing – Qualification**

Step 9:
Click ◀ to hide the Search area of the screen, to ensure all columns of the report are displayed.

Step 10:
You can also view a qualification results report for one of the candidates by clicking ■ next to the appropriate candidate.

Step 11:
Results can be downloaded by clicking **Download**

Step12:
Click on ⌂ the first Navigation bar to return to the Homepage.

CANDIDATE / RESULTS REPORTS: REGISTRATION LISTING REPORT

Introduction
This quick reference guide shows you how to run a registration listing report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Candidate results from the second navigation bar.

On the **Candidate results** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Candidate results** page, in the **Search** area of the screen, click the drop down menu in **Show me** field and select **Registration listing** from the options presented. Click in the **for qualification** field and enter a qualification code. *please note that * denotes a mandatory field.*

Specify a reporting period. Note that the **for period** defaults to 'The last week'. If you wish to change the period to be shown on the report, click in the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
The search results are now displayed on the right of the screen under **Candidate listing – Registration**

Step 5:
Click on ◀ to hide the **Search** area of the screen to ensure all columns of the report are displayed.

Step 6:
Click on the first navigation bar to return to the **Homepage.**

CANDIDATES / RESULTS REPORTS: RESULTS LISTING REPORT

Introduction
This quick reference guide shows you how to run a results listing report in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Candidate results from the second navigation bar.

On the **Candidate results** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Candidate results** page, in the **Search** area of the screen, click the drop down menu in **Show me** field and select **Results Listing** from the options presented. Click in the **for Assessment** field and enter an assessment code. *please note that * denotes a mandatory field*.

Specify a reporting period. Note that the **for period** defaults to 'The last week'. If you wish to change the period to be shown on the report, click the drop down in the **for period** field. You can also report using an **or since** date.

When you have entered your search criteria, click **Search**

Step 4:
The results of the search are now displayed on the right of the screen under **Candidate listing – Results**

Step 5:
Click on ◀ to hide the **Search** area of the screen to ensure all columns of the report are displayed.

Step 6:
Click on the first navigation bar to return to the **Homepage.**

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QUALIFICATIONS REPORT: LAST CERTIFICATION DATE REPORT

Introduction
This quick reference guide shows you how to display the last certification date for a qualification in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Qualifications from the second navigation bar.

On the **Qualifications** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Qualifications** page, in the **Search** area of the screen, click the drop down menu in the **Show me** field and select **Last Certification Date.** Click in the **for qualification** field and enter a qualification code.

Specify a reporting period. Note that the **for period** defaults to 'Next Month'. If you wish to change the period to be shown on the report, click in the drop down in the **for period** field. You can also report using an **or since** date or a **From / To** period.

When you have entered your search criteria, click **Search**

Step 4:
The search results are now displayed on the right of the screen under **Last certification date**

Step 5:
The last certification date for the qualification is now displayed under the **Last certification** column, under Your search results

Step 6:
Click on the first navigation bar to return to the **Homepage.**

QUALIFICATION REPORTS: LAST REGISTRATION DATE REPORT

Introduction
This quick reference guide shows you how to display the last registration date for a qualification in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Qualifications from the second navigation bar.

On the **Qualifications** page, if your centre works with both City & Guilds and ILM, please select the appropriate organisation from the drop down menu at the top of the page.

Step 3:
On the **Qualifications** page, in the **Search** area of the screen, note that the **Show me** field defaults to the **Last Registration Date.** Click in the **for qualification** field and enter a qualification code.

Specify a reporting period. Note that the **for period** defaults to 'Next Month'. If you wish to change the period to be shown on the report, click in the drop down in the **for period** field. You can also report using an **or since** date or a **From / To** period.

When you have entered your search criteria, click **Search**

Step 4:
The search results are now displayed on the right of the screen under **Last registration date**

Step 5:
The last registration date for the qualification is now displayed under the **Last registration** column, under Your search results

Step 6:
Click  on the first navigation bar to return to the Homepage.

REPORTS
Financial reports

Credit note search and order details NEW 115
Invoice search and order details NEW 118
Statement search and order details NEW 121

FINANCIAL REPORTS: CREDIT NOTE SEARCH AND ORDER DETAILS

Introduction
This quick reference guide shows you how to search for and download information relating to your Credit Notes in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, the Financial tab on the second navigation bar is selected as the default option.

Step 3:
Select the CREDIT NOTES tab, which will highlight in grey once chosen. You can search by sub headings: **Ref Number** or **Period / Date** or **Qualification.**

Select the sub heading required, and use the drop down lists and text entry fields within each section to assist with your search.

Note: If your centre works with both City & Guilds and ILM, please select the appropriate organisation from the 'Search By' buttons in the middle of the page. City and Guilds will be selected as the default option.

When you have entered your search criteria, click on **Search**

Step 4:
The Credit Notes returned are now listed in the **Credit note results summary** area at the base of the screen.

Note: The Credit Note numbers are displayed in numerical order, which make up the first column of the table. Each column heading can be selected to sort the information into ascending / descending order.

Click on a Credit Note number to display.

Step 5:
The invoice options and details are displayed.

Note: The table is arranged by order numbers which are in the second column of the table. Each column heading can be selected to sort the information into ascending / descending order.

To view a copy of your Credit Note – go to **Step 6**
To export details of your Credit Note – go to **Step 7**
To view Order and tracking Credit Note – go to **Step 8**

Step 6:
To print or save a certified copy of your Credit Note, click on **View PDF**

Your Credit Note will show in a pop-up box, and you can print or save this as normal. When you close this pop-up, or click outside the box, you will be returned to the credit note details page in Walled Garden.

Step 7:
To extract the details of your Credit Note to Excel, click on **Export**

Excel will open a new window, from which you can print or save as normal. When you close Excel, you will be returned to the Credit Note details page in Walled Garden.

Step 8:
To display a related Order, click on an **Order number** within the table.

Step 9:
The order details are displayed in the table under the heading **Order lines**

To display Order tracking details, click on the  in the **Order Tracking** column.

To display Order details, if available, click  in the **Order Details** column.

Step 10:
Click  on the first navigation bar to return to the **Homepage.**

FINANCIAL REPORTS: INVOICE SEARCH AND ORDER DETAILS

Introduction
This quick reference guide shows you how to search for and download information relating to your Invoice in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, the Financial tab on the second navigation bar is selected as the default option.

If your centre works with both City & Guilds and ILM, please select the appropriate organisation from the 'Search By' buttons in the middle of the page. The organisation will be highlighted in blue when selected.

Step 3:
On the INVOICES tab, which is preselected when you enter the Finance section, you can search by the sub headings: **Ref Number** or **Period / Date** or **Qualification.**

Select the sub heading required and use the drop down lists and text entry fields within each section to assist with your search.

Note: If your centre works with both City & Guilds and ILM, please select the appropriate organisation from the 'Search By' buttons in the middle of the page. City & Guilds will be selected as the default option.

When you have entered your search criteria, click on **Search**

Step 4:
The invoices returned are now listed in the **Invoice results summary** area at the base of the screen.

Note: The Invoice numbers are displayed in numerical order, which make up the first column of the table. Each column heading can be selected to sort the information into ascending / descending order.

Click on an Invoice number to display details of that invoice.

Step 5:
The invoice options and details are displayed.

Note: The table is arranged by Order numbers which are in the second column of the table. Each column heading can be selected to sort the information into ascending / descending order.

To view a copy of your Invoice – go to **Step 6**
To export details of your Invoice – go to **Step 7**
To view Order and tracking details – go to **Step 8**

Step 6:
To print or save a certified copy of your Invoice click **View PDF**

Step 7:
To extract the details of your Invoice to excel, click **Export**

Excel will open a new window, from which you can print or save as normal. When you close Excel, you will be returned to the Invoice details page in Walled Garden.

Step 8:
To display a related Order, click on an **Order number** within the table.

Step 9:
The order details are displayed in the table under the heading
Order lines

To display Order tracking details, click on the  in the column **Order Tracking.**

To display Order details, if available, click on the  in the column **Order Details.**

Step 10:
Click  on the first navigation bar to return to the **Homepage.**

FINANCIAL REPORTS
STATEMENT SEARCH AND ORDER DETAILS

Introduction
This quick reference guide shows you how to search for and download information relating to your Statement in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, the Financial tab on the second navigation bar is selected as the default option.

Step 3:
Select the tab STATEMENTS, which will highlight in grey once chosen.

If your centre works with both City & Guilds and ILM, please select the appropriate organisation from the 'Search By' buttons in the middle of the page. This will highlighted in blue when selected.

Note: City and Guilds will be selected as the default option.

Click **Search** to return results.

Step 4:
The outstanding items, as at today's date, are now listed in the table at the base of the screen. As these items may be recent, this statement may contain different information to that of the monthly statement you are sent.

Note: The Invoice or Credit Note numbers are displayed in numerical order, which make up the first column of the table. Each column heading can be selected to sort the information into ascending / descending order.

Click on an Invoice or Credit Note number to display.

Step 5:
The Invoice or Credit note details are displayed.

Note: The table is arranged by Order numbers which are in the second column of the table. Each column heading can be selected to sort the information into ascending / descending order.

To view a copy of the Invoice or Credit Note – go to **Step 6.**
To export details of the Invoice or Credit Note – go to **Step 7.**
To view Order and tracking Credit Note – go to **Step 8.**

Step 6:
To print or save a certified copy of the item, click **View PDF**

Your Invoice or Credit Note will show in a pop-up box, and you can print or save this as normal. When you close this pop-up, or click outside the box, you will be returned to the credit note details page in Walled Garden.

Step 7:
To extract the details of the item to Excel, click **Export** below.

Excel will open in a new window, from which you can print or save as normal. When you close Excel, you will automatically return to the details page.

Step 8:
To display a related order, click on an **Order number** within the table.

Step 9:
The order details are displayed in the table under the heading Order lines

To display Order tracking details, click on the  in the column **Order Tracking.**

To display Order details, if available, click on the  in the column **Order Details.**

Step 10:
Click  on the first navigation bar to return to the **Homepage.**

REPORTS
Users reports

Print list of Walled Garden users or export to CSV file NEW 125
Maintenance report NEW 126

USER REPORTS: PRINT LIST OF WALLED GARDEN USERS OR EXPORT TO CSV REPORT

Introduction
This quick reference guide shows you how to print a list of all your Walled Garden users as well as export the list to a CSV file on Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Settings** on the first navigation bar.

Step 2:
On the **Settings** page, select Centre settings from the second navigation bar.

Step 3:
Select MANAGE USERS from the tabs below **Centre settings.**

Step 4:
To print a list of Walled Garden users, select **Print list of users**. A pop-up window appears, where you can select a printer to print the list.

Step 5:
To Export to a CSV file, select **Print list of users**. A pop-up window will open at the base of the page asking if you would like to **Open, Save** or **Cancel**. Select option as required.

USER REPORTS: MAINTENANCE REPORT

Introduction
This quick reference guide shows you how to report on updates made to Centre Settings, Centre Preferences and your Users in Walled Garden.

Step 1:
Log in to Walled Garden and on the **Homepage** click **Reports** on the first navigation bar.

Step 2:
On the **Reports** page, select Maintenance from the second navigation bar

Step 3:
On the **Maintenance reports** page, select CENTRE CHANGES to review all updates made to all addresses, invoice methods, certificate dispatches and options for CUC, NCR or White paper.

Select USER CHANGES to review all new amendments and deletions to Walled Garden Users.

Note: All table headings can be can be sorted to show information in ascending or descending alphabetical order.

Step 4:
Click on the first navigation bar to return to the **Homepage.**

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