GA e-Exams Organisation Tasman Guide

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Beehive Ring Road
Crawley
West Sussex
RH6 0YR

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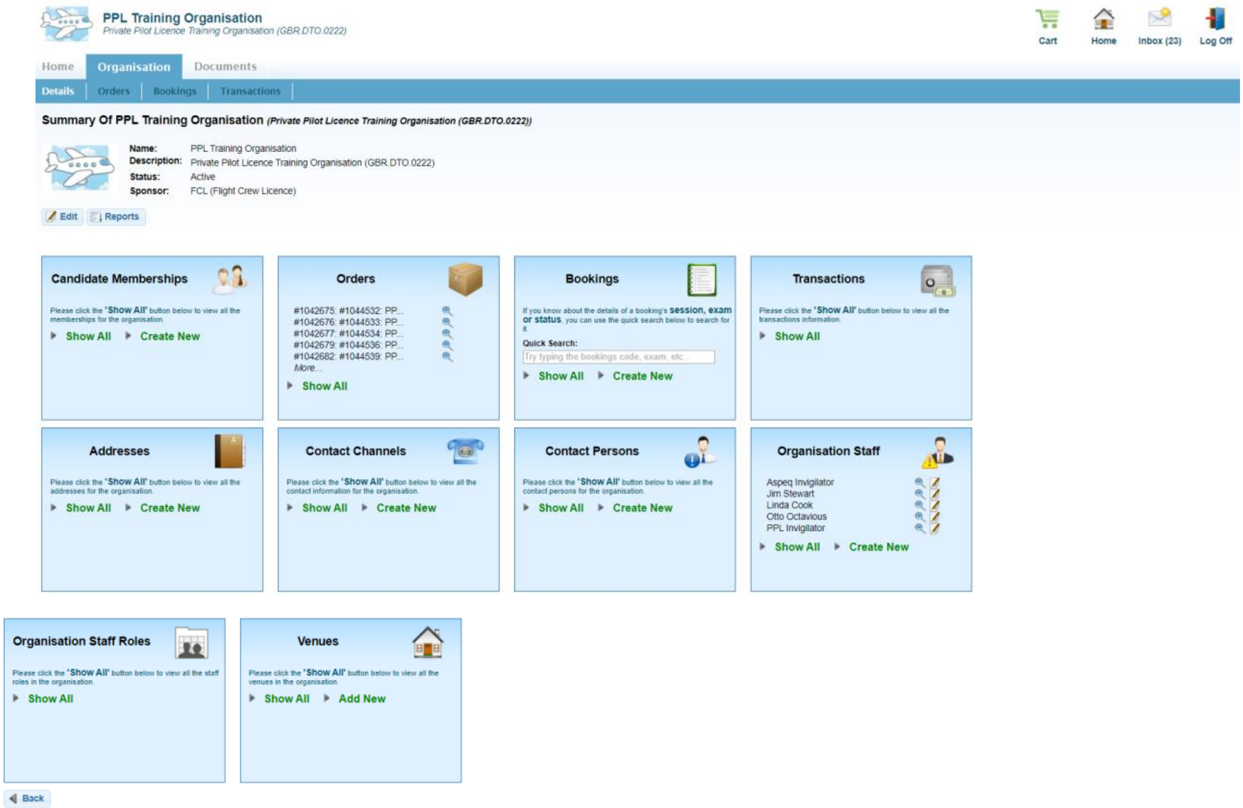
Enquiries regarding the content of this publication should be addressed to: PPLExams@caa.co.uk

Contents

UKCAA GA e-ExamsOrganisation Guide

1 Functions of Organisation Portal:

Organisations access Tasman though a specially constructed set of menu options. The Organisation Portal's "Organisation" screen contains a number of collection boxes which provide access to the organisation information and the ability to carry out necessary functions.



2 Setting up an organisation account:

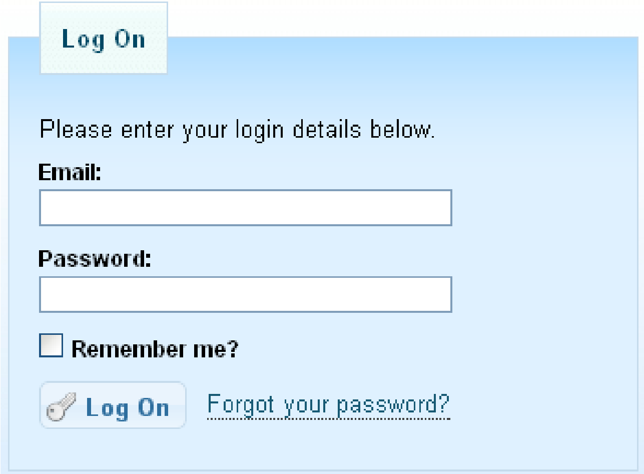
To become an administrator for your organisation, you will first need to register with CAA to establish an account. You will be required to provide the following information to the CAA Exam Admin Team to enable them to set up the account. e-mail your details to FCL-EExams@caa.co.uk

- Full name
- Date of birth
- Email address
- Organisation name

CAA will advise you of your username and temporary password once your account has been confirmed.

3 Accessing your account:

You will need to log into Tasman to access your account via the following URL – https://ato.caaexams.co.uk



Once logged on you will be able to access a variety of pages using menus at the top of the page.

4 Changing or resetting password:

You are able to change your password via the Home page when logged in.

If you have forgotten your password, then you can have it reset by clicking Forgot your password? on the login page. You will then need to enter the required account information and click Reset My Password.

5 Changing account details:

5.1 Changing administrator details:

You can view and change your account details by clicking on the Home page when logged in. From this page, you can edit your address and contact information.

You are requested to keep these details current as this will assist CAA in contacting you should the need arise. It is highly recommended that you provide an accurate email address as this will be the primary means of contact.

5.2 Changing organisation details:

To view and change your organisation details, click on the Organisation page when logged in. From this page you can edit your organisation's address and contact information.

6 Checking messages:

Messages are automatically sent to notify you of any significant activity regarding your account and bookings. Periodically messages will also be sent by CAA to inform you of any necessary changes to bookings or scheduling.

You are able to check your messages by clicking Inbox (11) at the top of the page when logged in. The page below will then appear. Note that the number in brackets indicates the number of unread messages.

Search Subject: Date From: 25 February 2014 Date To: 25 March 2014 Apply Reset

Type	From	Subject	Received	Last Updated	
	Helpdesk	Membership Organisation Confirmation	21/03/2014 02:08:41 PM	21/03/2014 02:08:41 PM	
	Helpdesk	Membership Organisation Confirmation	21/03/2014 02:37:11 PM	21/03/2014 02:37:11 PM	
	Helpdesk	Membership Organisation Request	18/03/2014 04:17:28 PM	18/03/2014 04:17:28 PM	
	Helpdesk	Membership Organisation Request	21/03/2014 02:36:26 PM	21/03/2014 02:36:26 PM	
	Helpdesk	**Membership Organisation Cancellation**	**21/03/2014 02:22:44 PM**	**21/03/2014 02:22:44 PM**	
	Helpdesk	**Membership Organisation Confirmation**	**21/03/2014 02:08:48 PM**	**21/03/2014 02:08:48 PM**	
	Helpdesk	**Membership Organisation Confirmation**	**18/03/2014 04:18:02 PM**	**18/03/2014 04:18:02 PM**	
	Helpdesk	**Membership Organisation Request**	**20/03/2014 04:00:47 PM**	**20/03/2014 04:00:47 PM**	
	Helpdesk	**Membership Organisation Request**	**21/03/2014 10:39:20 AM**	**21/03/2014 10:39:20 AM**	

Unread messages will appear in **bold**. Messages can be read either by double clicking or by clicking on the applicable message.

7 Managing memberships:

Tasman will enable the management of memberships between training organisations and candidates. This will allow you as the training organisation to make bookings on the candidates' behalf and view the candidates' results. Organisations are either requested to accept candidates' requests for membership with their organisation or they may actively offer membership to that candidate.

Being part of that organisation means that the candidate can book exams reserved by that organisation and access other functions that they would not be able to if they were not a member. Both candidates and organisation must approve the memberships before the membership relationship becomes fully valid.

Memberships can be cancelled at any time by either party.

7.1 Approving membership details:

All new memberships will need to be approved by the training organisation (or candidate) before they will come into effect.

User	State	Valid From	Valid Till	
John Smith	Requires organisations approval	14 February 2014	13 October 2015	
Rebecca Stowe	Requires candidates approval	20 March 2014	19 September 2015	
Mark Taylor	Approved	12 March 2014	11 September 2015	
Joshua Bell	Approved	11 September 2013	10 March 2015	

The 'State' will change to approved when validated by the training organisation.

Candidates cannot be booked into any exam session until their membership is validated by their training organisation.

8 Business Operations of the Training Organisation:

Business operations are the transaction-based actions performed by organisations for their candidates.

8.1 Orders

Orders are a combination of:

- bookings, cancellations, transfers, other purchases, etc, and
- receipt or payment of adjustment transaction for those charges.

The organisation owns the order if they paid for it. The organisation is able to view all orders that they own. Most of the accounting summary transaction detail is found by looking at these orders.

They can also print the Order Summary and Invoice for and from each order summary and view any other transaction-specific reports such as Booking Confirmations.

From the Orders page, an individual candidate's booking can be cancelled. It is also possible to (re)print an individual's confirmation notice.

8.2 Bookings

The Bookings part of the organisation portal enables an organisation to book individually or in bulk any of its own member candidates.

Payments can be made via the following payment options supported include:

- Supported Credit card
- Deduction from pre-existing credit
- Mixed deduction from pre-existing credit plus credit card, etc

No credit card details are retained – but subsequent refunds are possible via the transaction reference.

When an organisation makes a booking for a candidate, the organisation will own the order, but the candidate will own the event.

8.3 Transactions

By accessing the Transactions page, the organisation is able to view its Account Statement. This shows all of the transactions that make up the current balance of the account between the organisation and the domain.

9 Requesting a review

A review of an assessment or a test involves an evaluation by a CAA Subject Matter Expert of questions or aspects of the assessment highlighted by the candidate as unsatisfactory. A candidate can select a review through their personal account in the candidate portal within 14 calendar days of receiving the result. This is a paid service and the target time for completing a review once raised is 15 working days.

This review shall check:

- Relevance to appropriate subject matter
- Technical correctness of the question stem, and answer, and suitability of other options
- The language used, including grammar, syntax, level and style
- Instructions to candidates and any other points which the candidate may have raised

Candidates who have received a mark greater than 50% in an assessment or have not achieved the desired level of competency in a test may request a review.

Candidates who have applied for a review are advised not to re-sit or rebook the examination until the review outcome has been issued. Candidates who choose to go ahead with the exam while the review is still being processed must be aware that the last result obtained is the measure of competence and that result will be recorded as the official result. This means that if the review results in a Pass and the exam resit is a Fail, the Fail result stands.

Candidates will be advised via email of the outcome, and any changes to examination marks will be reflected on the results page in the normal way. Any review that changes the result from a fail to a pass for the candidate, will have the review fee refunded in full.

The assessments and tests are not available for release to the candidate, as they are Intellectual Property of the CAAUK. Answer sheets, markings and any recordings also will be withheld.

To view the fees and to apply for a review click My Account then My Results Transcripts for exams sat

Click on the Blue Flag icon to the right of the result to start the review process or alternatively click the to the right of the result then Request Review. To confirm and pay for the review click on Add to Cart and follow the Cart process.

10 Paying in Money/Crediting an Account

An organisation can credit its account by paying in money at any time. The credit can be used to pay for any bookings made by the organisation.

Payment can be made via credit card.

11 Staff and Roles:

Organisations can only act through their staff who are given staff roles and who access the organisation portal of Tasman. Each role has a specific system function and can only be amended by UKCAA Admin by contacting PPLExams@caa.co.uk.

12 Reporting:

1. Exams Performance

This is a list of exam performance summary for the organisation over the given period. This is based on all bookings for that organisation.

2. Membership Exams Performance

This is a list of all completed exam performance summary for a member (an individual) of the organisation over the given period. This is based on all bookings for that organisation.

13 Venues:

Training organisations can only book exams into venues that are associated to the training organisation.

14 How to Use Tasman

14.1 Organisation

14.1.1 Edit Organisation Information

❖ **To edit organisation details from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- Click *Edit*.
- Make any necessary changes as required.
- Click *Save*.

14.1.2 Upload Logo - Organisation Portal

❖ **To upload logo:**

- Select the "Details" tab on the "Organisation" page.
- Click *Edit*.
- Click  or image. This will prompt you to upload the file. ***Note:*** Image has to be under 50 KBs.
- Click *Save*.

14.1.3 Reports - Organisation Portal

14.1.3.1 Exams Performance

❖ **To generate exam performance report for organisation:**

- Select the "Details" tab on the "Organisation" page.
- Click *Reports*.
- In the "Exams Performance" section, insert "From" and "To" dates.
- Select "Specialisation".
- Select "Licence".
- Click *Generate*.

The report gives you the following information:

- Exam
- Specialisation
- Licence
- Booked number
- Delivered numbers
- DNS numbers
- Pass numbers
- Fail numbers
- % pass 1st
- % pass 2nd
- % pass 3rd

14.1.3.2 Membership Exams Performance

❖ **To generate exam performance report for membership:**

- Select the "Details" tab on the "Organisation" page.
- Click *Reports*.

- In the "Membership Exams Performance" section, insert "From" and "To" dates.
- Select "Specialisation".
- Select "Licence".
- Click *Generate*.

The report gives you the following information:

- Organisation
- Candidate
- Exam
- Booked number
- Delivered numbers
- DNS numbers
- Pending numbers
- Fail numbers
- Pass numbers
- Result mark

14.1.4 Candidate Memberships - Organisation Portal

14.1.4.1 Create Membership

❖ **To create organisation membership:**

- Select the "Organisations" tab on the "Users" page.
- In "Candidate Memberships" box, click *Create New* or *Show All*. If you click *Show All*, click *Create Membership*.
- Enter the "Customer Number" in the "Candidate" box.
- Enter "Date of Birth".
- Click "*Lookup*". This will bring up the candidate's details.
- Click *Save*.

Note: This functionality may not be applicable to all organisations. Membership may have been set to occur during candidate registration. Organisations will have to "approve" membership requests from candidates.

14.1.4.2 View Memberships

❖ **To view organisation members:**

- Select the "Organisations" tab on the "Users" page.
- In the "Candidate Memberships" box, click *Show All*.
- This will bring up a list of all the organisation's active members (default value).

- Untick the "Active Only" box to view all memberships.

You can add new membership by clicking *Create Membership* at the bottom of this page.

14.1.4.3 Reject/Approve Organisation Membership

❖ **To reject or approve organisation membership and permissions:**

- Select the "Organisations" tab on the "Users" page.
- In the "Candidate Memberships" box, click *Show All*.
- Untick the "Active Only" box to view all members (past, present and pending).
- To access a record, double click or click ⓘ on the applicable row (***Note:*** memberships yet to be approved will have a State of "Requested").
- Click *Reject Membership* or *Approve Membership*.
- Click *Continue* to reconfirm.

Note: You will receive an alert of any membership requests or or membership cancellations in your Inbox.

14.1.4.4 Cancel an Existing Membership

❖ **To cancel an existing organisation membership:**

- Select the "Organisations" tab on the "Users" page.
- In the "Candidate Memberships" box, click *Show All*.
- To access a record, double click or click ⓘ on the applicable row.
- Click *Cancel Membership.*
- Click *Continue* to reconfirm.

Note: When this action is taken the candidate will receive an email advising of the cancellation. Likewise, if a candidate cancels a membership with your training organisation, you will receive an email advising of the cancellation.

14.1.4.5 Member Identities

14.1.4.5.1 VIEW CANDIDATE IDENTITY

❖ **To view identity record for member:**

- Select the "Details" tab on the "Organisation" page.
- In the "Candidate Memberships" box, click *Show All*.
- To access a specific member profile, double click or click ⓘ on the applicable row. This will take you to the Viewing Summary page.
- In the "Identities" box, click *Show All*.

- To access a record, double click or click .

14.1.4.5.2 VALIDATE/INVALIDATE CANDIDATE IDENTITY

❖ **To validate/invalidate identity for member:**

- Select the "Details" tab on the "Organisation" page.
- In the "Candidate Memberships" box, click *Show All*.
- To access a specific candidate profile, double click or click on the applicable row. This will take you to the user Viewing Summary page.
- In the "Identities" box, click *Show All*.
- To access a record, double click or click on the applicable row.
- Click *Validate* or *Invalidate Identity*.
- Enter "Reason" if applicable.
- Click *Continue*.

Note: Member's identity records must be viewed before the identity can be validated. You will see an alert at the top of the candidate's page if the identity has not been validated.

14.1.4.6 Member Results

14.1.4.6.1 VIEW MEMBER RESULTS

❖ **To view results:**

- Select the "Organisations" tab on the "Users" page.
- In "Candidate Memberships" box, click *Show All*.
- To access a record, double click or click .
- In the "Results" box, click *Show All or* on the applicable row.
- Double click or click on the applicable row to view details

Note: DNS records will not show on the results page. They are recorded in the Bookings page.

14.1.4.6.2 PRINT RESULT AND KDR

❖ **To print result and KDR:**

- Select the "Candidates" tab on the "Users" page.
- To access a specific candidate profile, double click or click on the applicable row. This will take you to the user Viewing Summary page.
- In the "Results" box, click *Show All or* on the applicable row.
- Double click or click on the applicable row to view details.
- Click on *Print this Transcript* to print result.

- Click to print.

14.1.5 Orders - Organisation Portal

This section allows the organisation to manage orders made by the organisation on behalf of their members.

14.1.5.1 View Organisation Orders

❖ **To view organisation orders:**

- Select the "Details" tab on the "Organisation" page.
- In "Orders" box, click *Show All*. (You can also access this by selecting the "Orders" tab on the "Organisation" page). This will list all bookings and services that has been actioned for the organisation.
- Double click or click on the applicable row to view details.

Note 1: Orders can also be viewed by clicking the Orders tab on the organisation page.

Note 2: If paying by cheque or electronic payment (direct credit), the payment will require the Authority's administrative approval. Once the approval process has been carried out, the payment status for that order will change from "Pending" to "Accepted" ("**Processing**" to "**Complete**").

All bookings yet to be approved will only show on the Orders page in **orange**. These bookings will have a pencilled status in the system until they are finalised.

14.1.5.2 Cancel Booking

❖ **To cancel bookings:**

- Select the "Details" tab on the "Organisation" page.
- In "Orders" box, click *Show All*. You can also access this by selecting the "Orders" tab on the "Organisation" page.
- Double click or click on the applicable row to view details.
- Click on on the applicable booking row.
- Click "*Cancel Booking*".
- Enter "Reason for Cancellation" (if applicable) and click *Add to Cart*.
- If all correct, click *Next*.
- Select the correct billing address.
- Tick the "Terms and Conditions" box and click *Next*.
- If all Payment Details are correct, click *Next.*
- Booking is cancelled and you can print the *Order Summary and Invoicing.*

14.1.5.3 Print Confirmation

❖ **To print confirmation:**

- Select the "Details" tab on the "Organisation" page.
- In "Orders" box, click *Show All*. You can also access this by selecting the "Orders" tab on the "Organisation" page.
- Double click or click on the applicable row to view details.
- Click on .
- Click "Print Confirmation" to print.

14.1.6 Bookings - Organisation Portal

14.1.6.1 Create Organisation Bookings - Bulk Bookings

❖ **To create organisation bookings from the organisation portal:**

Note: Bulk bookings is possible if made via the organisation booking page. However, bulk bookings can only be done if candidates are sitting the same subjects. If candidates are sitting different subjects, then separate bulk bookings are to be processed.

- Select the "Organisations" tab on the "Users" page.
- To access a specific organisation profile, double click or click on the applicable row.
- In "Bookings" box, click *Create New*.
- Select an exam from the list of available exams and click to highlight.
- Double click or click *Next* to continue.
- Select the venue. The TOs default venue will be displayed. To search for other venues associated to the TO, type the venue name in the “venue” field and select the venue.
- Click *Next* to continue.
- Add candidates to the booking by typing their name into the "Search" box and selecting their name from the drop-down menu that appear. Add selected candidate by highlighting and double clicking the right candidate record (***Note:*** Multiple candidates can be added. In the organisation portal, only the names of candidates who are already members of the organisation will display).
- To remove candidate/s, highlight the candidate record in the "Candidates" box and click *Remove* or *Remove All*.
- When all desired candidates have been added click ‘*Next*'.
- Review details and if correct click *Add to Cart* (***Note:*** If you leave the booking process at this point but remain logged in, the booking will have a status "*Pencilled"* and will remain in the cart unless you "Clear Cart" or the 10 minutes are up).
- Review the Cart Summary.
- Once done, click *Next.*
- You can change the "Billing Address" if applicable.
- Tick the "Terms and Conditions" box.

- Click *Next* to continue.
- Enter payment details and click *Next*.
- Booking is confirmed and you can print the *Order Summary and Invoicing* and also *Booking Confirmation*. You can also *View Order* from here.

14.1.6.2 View Organisation Bookings

❖ **To view organisation bookings from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In "Bookings" box, click *Show All*. (You can also access this by selecting the "Bookings" tab on the "Organisation" page).
- Double click or click on the applicable row.

You can create new bookings for the candidate by clicking *Create Booking* at the bottom of this page.

Note: After the payment has been made, the booking status will be “Confirming (Paid)”. This status will update to “Confirmed (Paid)” once the exam delivery system has generated the exam.

14.1.6.3 Print/View Organisation Booking Confirmation

❖ **To print or view organisation booking confirmation from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In the "Bookings" box, click *Show All*. (You can also access this by selecting the "Bookings" tab on the "Organisation" page).
- Double click or click on the applicable row.
- Click on "Print Booking Confirmation" to view pdf file.

Note: You can also print your booking confirmation from the "Orders" box by clicking for each record.

14.1.6.4 Cancel Organisation Bookings

❖ **To cancel organisation bookings from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In the "Bookings" box, click *Show All*. (You can also access this by selecting the "Bookings" tab on the "Organisation" page).
- To access a record in detail, double click or click on the applicable row.
- Click *Cancel Booking*.
- Enter "Reason for Cancellation" (if applicable) and click *Add to Cart*.
- If all correct, click *Next*.
- Select the correct billing address.
- Tick the "Terms and Conditions" box and click *Next*.
- If all Payment Details are correct, click *Next.*

- Booking is cancelled and you can print the *Order Summary and Invoicing.*

Note: You can also cancel your bookings from the "Orders" box by clicking then for each record.

14.1.6.5 *Organisation Venues - Organisation Portal*

14.1.6.5.1 VIEW ORGANISATION VENUES

❖ **To view organisation venues from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In the "Venues" box, click *Show All*.
- To access a venue in detail, double click or click on the applicable row.

14.1.6.5.2 VIEW VENUE BOOKINGS

❖ **To view bookings at an organisation venue from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In the "Venues" box, click *Show All*.
- To access a venue in detail, double click or click on the applicable row.
- In the “Bookings” box, click *Show All.*

Note 1: By default, the bookings list displays all bookings. To only display active bookings that the exam delivery system has confirmed select *“Confirmed”* in the “Status” drop down and then click “Apply”. Bookings that have been paid but are yet to be confirmed by the exam delivery system will have a status of *“Confirming…”*.

Note 2: To sort the list of bookings, click on any of the headers of the booking table.

Note 3: To view details of the booking double click or click on the applicable row.

14.1.7 Organisation Venues - Organisation Portal

14.1.7.1 *View Organisation Venues*

❖ **To view organisation venues from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In the "Venues" box, click *Show All*.
- To access a venue in detail, double click or click on the applicable row.

14.1.7.2 *View Venue Bookings*

❖ **To view bookings at an organisation venue from the organisation portal:**

- Select the "Details" tab on the "Organisation" page.
- In the "Venues" box, click *Show All*.
- To access a venue in detail, double click or click on the applicable row.
- In the “Bookings” box, click *Show All.*

Note 1: By default, the bookings list displays all bookings. To only display active bookings that the exam delivery system has confirmed select *"Confirmed"* in the "Status" drop down and then click "Apply". Bookings that have been paid but are yet to be confirmed by the exam delivery system will have a status of *"Confirming…".*

Note 2: To sort the list of bookings, click on any of the headers of the booking table.

Note 3: To view details of the booking double click or click on the applicable row.

14.1.8 Transactions - Organisation Portal

14.1.8.1 View Transactions

❖ **To view transactions:**

- Select the "Details" tab on the "Organisation" page.
- In the "Transactions" box, click *Show All*. (You can also access this by selecting the "Transactions" tab on the "Organisation" page).
- Double click or click on the applicable row.
- Clicking on will allow you to Cancel Booking or Print Confirmation.

14.1.8.2 Print Invoice/Receipt/Credit Note

❖ **To print invoice or receipt**

- Select the "Details" tab on the "Organisation" page.
- In the "Transactions" box, click *Show All*. (You can also access this by selecting the "Transactions" tab on the "Organisation" page).
- Double click or click on the applicable row.
- Click on *Print Receipt* or *Print Invoice* or *Print Credit Note.*

14.1.8.3 Print Account Statement

❖ **To print account statement:**

- Select the "Details" tab on the "Organisation" page.
- In the "Transactions" box, click *Show All*. (You can also access this by selecting the "Transactions" tab on the "Organisation" page).
- Click on Print Statement at the bottom of the page.

14.1.8.4 Credit Account - Organisation Guide

Note: This functionality may not be made available to all organisations.

❖ **To credit account:**

- Select the "Details" tab on the "Organisation" page.
- In the "Transactions" box, click *Show All*. (You can also access this by selecting the "Transactions" tab on the "Organisation" page).

- Click on *Receipting* at the bottom of page.
- Enter payment details.
- Click *Credit Account*.

Note 1: Status of all credit payment can be viewed via Orders or Details.

14.1.9 Addresses - Organisation Portal

14.1.9.1 Create Organisation Addresses

- **To create address for organisation:**
  - Select the "Details" tab on the "Organisation" page.
  - In "Addresses" box, click *Create New* or *Show All*. If you click *Show All*, click *Create Address.*
  - Select "Type" from dropdown box.
  - Type details in "Line 1".
  - Type details in "Line 2" and "Line 3" (if applicable).
  - Select "Country".
  - Select "Region/State" from dropdown menu.
  - Type "City" (if applicable)
  - Type "Postal Code".
  - Tick the "Preferred (default address)" box if applicable.
  - Click *Save*. This will bring you back to the Viewing Summary page.

14.1.9.2 View/Edit Organisation Address

- **To view and/or edit address for organisation:**
  - Select the "Details" tab on the "Organisation" page.
  - In the "Addresses" box, click *Show All*. This will list all address that has been entered for the organisation.
  - To access a record, double click or click or on the applicable row. (If you double clicked on row or clicked , then you need to click *Edit*).
  - Change or amend details.
  - Click *Save*.

You can add new address by clicking *Create Address* at the bottom of this page.

14.1.10 Contact Channels - Organisation Portal

14.1.10.1 Create Organisation Contact Info

- **To create contacts info for organisation:**
  - Select the "Details" tab on the "Organisation" page.

- In "Contact Channels" box, click *Create New* or *Show All*. If you click *Show All*, click *Create Contact Information*.
- Select "Type" from dropdown box.
- Enter "Description" e.g. work email, home number etc.
- Type in "Details" i.e. phone number.
- Tick "Preferred" (if applicable).
- Click *Save*.

14.1.10.2 Edit/View Organisation Contact Info

❖ **To edit/view contact info for organisation:**

- Select the "Details" tab on the "Organisation" page.
- In the "Contact Channels" box, click *Show All*. This page lists all contact info that has been entered for the organisation.
- To access a record, double click or click or on the applicable row. (If you double clicked on row or clicked , then you need to click *Edit*).
- Change or amend details.
- Click *Save*.

You can create new contact info by clicking *Create Contact Information* at the bottom of Manage Contact Information page.

14.1.11 Contact Persons - Organisation Portal

14.1.11.1 Create Organisation Contact Person

❖ **To add contact persons for organisation:**

- Select the "Details" tab on the "Organisation" page.
- In "Contact Persons" box, click *Create New* or *Show All*. If you click *Show All*, click *Create Contact*.
- Type "First Name" of contact.
- Next type "Family Name".
- Then type "Role" of contact within the organisation.
- Click *Save*.

14.1.11.2 Edit/View Organisation Contact Details

❖ **To edit and/or view contact persons for organisation:**

- Select the "Details" tab on the "Organisation" page.
- In the "Contact Persons" box, click *Show All*. This will list all contact info that has been entered for the organisation.

- To access a record, double click or click or on the applicable row. (If you double clicked on row or clicked , then you need to click *Edit*).
- Amend details.
- Click *Save*.

You can create new contacts by clicking *Create Contact Information* at the bottom of Manage Contact Information page.

14.1.11.3 Add Details of Organisation Contact Person

❖ **To add details of contact for an organisation:**

- Select the "Details" tab on the "Organisation" page.
- In the "Contact Persons" box, click *Show All*. This will list all contact info that has been entered for the organisation.
- To access a record, double click or click .
- Under "Details", click *Create New*.
- Select "Type" from dropdown menu
- Enter "Description" e.g. work email, home number etc.
- Type in "Details" i.e. phone number.
- Tick "Preferred" (if applicable).
- Click *Save*.

14.1.12 Organisation Staff - Organisation Portal

14.1.12.1 Add Organisation Staff

Note: This functionality may not be available to all sponsors.

❖ **To add staff for organisation contact the CAA Exam Admin Team.**

14.1.12.2 Edit/View Organisation Staff Info

❖ **To edit/view staff information contact the CAA Exam Admin Team.**

14.1.12.3 Change/ Reset Organisation Staff Password

❖ **To change/reset staff password the CAA Exam Admin Team.**

14.1.12.4 Addresses - Organisation Staff

14.1.12.4.1 CREATE ORGANISATION STAFF ADDRESS

❖ **To add administrator address:**

- Select the "Details" tab on the "Organisation" page.
- In the "Organisation Staff" box, click *Show All*. This will list all administrators that has been entered for the organisation.

- To access a record, double click or click on the applicable row.
- In the "Addresses" box, click *Create New* or *Show All*. If you click *Show All*, click *Create Address.*
- Select "Type".
- Type details in "Line 1".
- Type details in "Line 2" and "Line 3" (if applicable).
- Select "Country".
- Select "Region/State" from dropdown menu.
- Type "City" (if applicable)
- Type "Postal Code".
- Tick the "Preferred (default address)" box if applicable.
- Click *Save*. This will bring you back to the Viewing Summary page.

14.1.12.4.2 EDIT/VIEW ORGANISATION STAFF ADDRESS

❖ **To edit/view administrator address:**

- Select the "Details" tab on the "Organisation" page.
- In the "Organisation Staff" box, click *Show All*. This will list all administrators that has been entered for the organisation.
- To access a record, double click or click on the applicable row.
- In the "Addresses" box, click *Show All*.
- Double click or click or on the applicable row. (If you double clicked on row or clicked , then you need to click *Edit*).
- Change or amend details.
- Click *Save*.

You can add new address by clicking *Create Address* at the bottom of this page.

14.1.12.5 Contact Channels - Organisation Staff

14.1.12.5.1 CREATE CONTACT INFO

❖ **To create contacts info for organisation staff:**

- Select the "Details" tab on the "Organisation" page.
- In the "Organisation Staff" box, click *Show All*. This will list all administrators that has been entered for the organisation.
- To access a specific staff profile, double click or click on the applicable row.
- In the "Contact Channels" box, click *Create New* or *Show All*. If you click *Show All*, click *Create Contact Information.*

- Select "Type" from dropdown box.
- Enter "Description" e.g. work email, home number etc.
- Type in "Details" i.e. phone number.
- Tick "Preferred" (if applicable).
- Click *Save*.

14.1.12.5.2 EDIT/VIEW CONTACT INFO

❖ **To edit/view contact info for organisation staff:**

- Select the "Details" tab on the "Organisation" page.
- In the "Organisation Staff" box, click *Show All*. This will list all administrators that has been entered for the organisation.
- To access a specific staff profile, double click or click on the applicable row.
- In the "Contact Channels" box, click *Show All*. This page lists all contact info that has been entered for the organisation staff.
- To access a record, double click or click or on the applicable row. (If you double clicked on row or clicked , then you need to click *Edit*).
- Change or amend details.
- Click *Save*.

You can create new contacts for organisation staff by clicking *Create Contact Information* at the bottom of the page.

14.1.12.6 User Messages - Organisation Staff

14.1.12.6.1 VIEW/READ MESSAGE

❖ **To view/read message:**

- Select the "Organisations" tab on the "Users" page.
- To access a specific staff profile, double click or click on the applicable row.
- In the "Organisation Staff" box, click *Show All*. This will list all administrators that has been entered for the organisation.
- To access a record, double click or click on the applicable row.
- In the "User Messages" box, click *Show All or* on the applicable row.
- Double click or click on the applicable row.

14.1.13 Organisation Staff Roles - Organisation Portal

14.1.13.1 View Organisation Staff Roles

❖ **To view an organisation staff role:**

- Select the "Details" tab on the "Organisation" page.
- In the "Organisation Staff Roles" box, click on *Show All*.
- To view a record, double click or click on the applicable row.

14.1 Documents

14.1.1 Documents

14.1.1.1 View Organisation Documents

❖ **To view Training Organisation Documents:**

- Select the "Documents" tab on the "Documents" page.
- In the "Documentation" section, select the tab of the documentation area that you wish to view.