

GA e-Exams Organisation Tasman Guide

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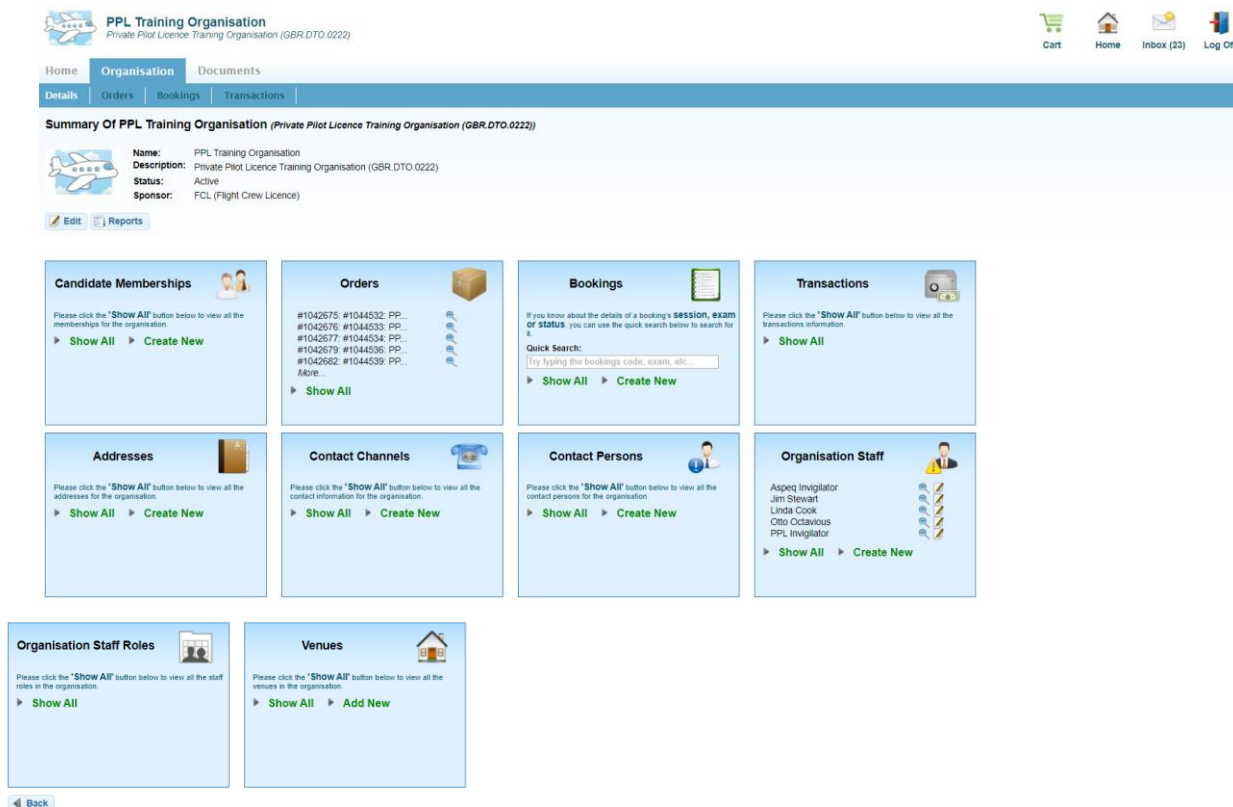
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UKCAA GA e-Exams Organisation Guide

1 Functions of Organisation Portal:

Organisations access the Tasman e-Exams system through 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:

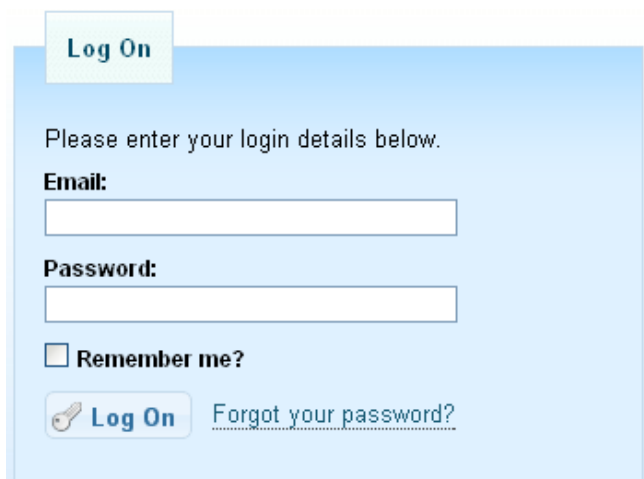
To become an administrator for your organisation, you will first need to register with CAA to establish an account. You will be required to provide the following information to the CAA Exam Admin Team to enable them to set up the account. e-mail your details to FCL-EEExams@caa.co.uk

- 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



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.

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 approved 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 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.

10 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.

11 Reporting:

1. Exams Performance

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

2. Memberships Exam Performance

This is a 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.

12 Venues:

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