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CAAR Academy OrgAdmin Quick Start Guide

Initial Setup instructions, OrgAdmin features & FAQ

This guide explains the initial setup required for an Organization Administrator (OrgAdmin) in CAAR Academy. Complete the **Initial Organization Setup** before registering Learners or paying for training.

Once the initial setup is complete, future registrations will be faster and easier to complete.

Portal	www.caar-academy.org
Support	training@caar.org
Who should use this guide	Organization Administrators (OrgAdmin) responsible for registering Learners for Training.

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1. Set Up Your OrgAdmin Account

OrgAdmin access allows you to register Learners, complete payment, monitor course progress, manage organization locations, associate users with locations, and grant OrgAdmin access to another user when required.

Create Your Account

1. **Open CAAR Academy.** Go to www.caar-academy.org and select Register in the upper right corner.
2. **Enter your information.** Provide your first name, last name, and email address.
3. **Identify your organization.** Select your organization from the list. If it does not appear, select My organization is not listed and enter its name. Select the independent option only if you are not associated with an organization.
4. **Create a password.** Enter the password again in the Confirm password field.
5. **Create the account.** Select Create account and follow the email confirmation instructions.

Important: You must confirm your email address before you can sign in.

Confirm Your Email Address

After selecting Create account, the Register confirmation page asks you to check your email to confirm your account.

1. **Open your email inbox.** Use the inbox for the email address entered when creating your account.
2. **Open the welcome email.** Look for the message titled Welcome to the CAAR Academy! from DoNotReply.
3. **Confirm your email address.** In the email, select Confirm My Email Address.
4. **Check the confirmation.** CAAR Academy opens the Confirm email page and displays Thank you for confirming your email.
5. **Sign in.** Select Login in the upper right corner. Enter your email address and the password created during registration, then select Sign in.

If the email does not arrive Check your junk or spam folder. If you still cannot find it, contact training@caar.org for assistance.

Obtain OrgAdmin Access

After your account has been created, email training@caar.org to request OrgAdmin access. An existing OrgAdmin assigned to your organization may also grant this access.

An organization may have more than one OrgAdmin. This can help organizations share responsibility for registrations, payments, locations, and Learner management.

After access is granted: Sign out of CAAR Academy and sign back in so the updated permissions take effect.

2. Complete the Initial Organization Setup

The initial setup should be completed before the first Group Registration. Billing information is required for payment. Office locations are optional unless your organization wants to organize Learners by branch or location.

Update Your Organization Billing Information

The Billing Email and Province fields must be populated before Stripe can successfully process a payment.

1. **Open My Organization.** Select your email address in the upper right corner, then select **My Organization**.
2. **Open the organization settings.** Select **Edit organization** from the organization overview page.
3. **Enter the billing email.** Under Billing contact, enter the **email address** that should receive billing and payment information in the Billing Email field.
4. **Review the billing address.** Confirm that the address, city, postal code, and country are correct.
5. **Select the billing province.** Open the Province menu and select the province associated with the billing address.
6. **Save the information.** Select **Save changes**.

7. **Confirm the update.** A message will appear on the organization overview page confirming that the information has been updated.

Important: If the Billing Email or Province field is blank, Stripe may not be able to process the payment.

Add an Office Location

Add office locations when your organization wants Learners associated with specific branches or offices. If your organization operates from one location and does not need location-based reporting, this step may not be required.

1. **Open My Organization.** Select your email address in the upper right corner. Under Organization, select **My Organization**.
2. **Open Office locations.** Select **Office locations** from the organization page.
3. **Enter the location information.** Under **Add location**, enter the location name, address, city, province, postal code, country, phone number, and email address.
4. **Identify the location settings.** Select Head office if this is the organization's primary location. Select Active location for every location that should be available for assignment and use.
5. **Save the location.** Select Save location. The location will appear in the office location list.

Important: Head office and Active location are separate settings. A location should be marked Active if it needs to be available for Learner assignment.

3. Register Learners for Training

Use Group Registration whenever you are registering a Learner in your organization. You may register one Learner, several Learners, or yourself through this section.

1. **Open Group Registration.** Select **Group Registration** from the top menu, then select **Register a group**, even when registering only one individual.
2. **Confirm your organization.** The organization will be populated automatically from your account. Confirm that it is correct.
3. **Confirm the contact information.** Review the contact name and contact email.
4. **Select the course.** Open the Course menu and select the course for this registration. Preferred start month is not necessary to complete the course registration.
5. **Select existing users.** Choose any existing organization users who should be registered for the selected course.
6. **Add new Learners.** Select **Add new learner** and enter the first name, last name, and email address for each new Learner. Each Learner must have a unique email address that they can access.
7. **Review the registration.** Confirm the course, contact information, and Learner details. Check email addresses carefully because they connect each Learner to the correct account and training record.
8. **Submit the registration.** Select **Submit group registration**.

Current registration limitation: Each Group Registration can include only one course. You may register one or more Learners for that course. Complete a new Group Registration for each additional course.

4. Complete Payment Through Stripe

After the Group Registration is submitted, Stripe opens automatically. You do not need to navigate to My Invoices, select View invoice, or choose Pay Balance before paying.

- **Wait for Stripe to open.** The payment page will display the invoice number and total amount owing.
- **Review the contact information.** Confirm that the email address displayed under Contact information is correct.
- **Enter Credit Card information.** Enter the card number, expiry date, security code, cardholder name, and country or region.
- **Choose whether to save the payment information.** Select Save my information for faster checkout if desired. This is optional.

- **Submit the payment.** Select Pay and wait while the payment is processed. Do not close or refresh the page.
- **Confirm payment and course access.** After payment is processed, you will return to the Group Registration details page. Confirm that Billing displays Paid, Course access displays Access active, and the invoice has a zero outstanding balance.
- **View the paid invoice when needed.** Select View invoice under Organization billing to review or download the invoice.

Learners Course access: Learners are enrolled once payment has been successfully processed. They will receive an automated email confirming their enrolment and directing them to CAAR Academy. First-time learners will first receive an email with instructions to reset their password, then sign in to CAAR Academy to begin their course.

5. Associate a Learner with a Location

Office locations help your organization organize learners by branch or office. Before assigning a learner to a location, first register the learner for a course through Group Registration. Once the registration has been submitted, follow the steps below.

Before associating a learner with a location, you must first add the location to your organization. See Add an Office Location on page 2 for instructions.

1. **Open My Organization.** Select your email address in the upper right corner, then select *My Organization*.
2. **Locate the Learner.** Under *Users and activity*, find the Learner you want to associate with a location.
3. **Open the Learner profile.** Select *Manage user* beside the Learner's name.
4. **Select the office location.** Open the *Office location menu* and select the appropriate location.
5. **Save the assignment.** Select Save changes. The Learner is now associated with the selected location.

If the user does not appear: Confirm that the user has been connected to the organization through Group Registration and that payment has been completed.

6. Add Another OrgAdmin

An organization may have more than one OrgAdmin. Access can be granted by CAAR at training@caar.org or by an existing OrgAdmin assigned to the organization.

Before granting access, confirm that the individual has a CAAR Academy account and is connected to the correct organization.

If you are an existing OrgAdmin, follow these steps to grant OrgAdmin access to another person in your organization:

1. **Open My Organization.** Select your email address in the upper right corner of CAAR Academy. Under Organization, select My Organization.
 2. **Locate the individual.** Under Users & activity, find the individual who requires OrgAdmin access.
 3. **Open their profile.** Select Manage user beside their name.
 4. **Grant OrgAdmin access.** Scroll to Roles and select the OrgAdmin checkbox. Leave Learner selected.
 5. **Save the changes.** Select Save changes.
 6. **Ask the new OrgAdmin to sign in again.** They must sign out and sign back in for their updated permissions to take effect.
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7. View Learner Progress and Completion

OrgAdmins can monitor learner progress and completion through **Group Registration**.

1. **Open Group Registration.** Select **Group Registration** from the top menu, then select **View group progress**.

2. **Locate the registration.** Find the applicable course registration. The overview displays the number of learners registered, started, and completed, along with the average progress and certificate count.
3. **Open the details.** Select **View progress** beside the applicable registration.
4. **Review individual progress.** Scroll to **Learner progress** to view each learner's status, progress percentage, last activity, and completion date.

Access Certificates Through Group Registration

OrgAdmins can also access learner certificates directly from the registration details.

1. **Open Group Registration.** Select **Group Registration** from the top menu, then select **View group progress**.
2. **Open the applicable registration.** Locate the course registration and select **View progress**.
3. **Locate the learner.** Scroll to **Learner progress** and find the learner's name.
4. **Open the certificate.** Select **View** in the **Certificate** column beside the learner.
5. **Save or print the certificate.** Use the PDF viewer's download or print options.

8. Access Learner Certificates

OrgAdmins can view and download certificates for learners connected to their organization.

1. **Open Organization Certificates.** Select your email address in the upper right corner of CAAR Academy. Under **Organization**, select **Organization Certificates**.
2. **Locate the certificate.** Use the **Search** field to search by learner name, email address, course, or certificate number. You can also filter by **Course** and **Status**. Select **Apply** to display the results.
3. **Review the details.** Locate the learner and course in the list. The certificate's issue date, expiry date, and status are displayed.
4. **Open the certificate.** Under **Actions**, select **PDF** beside the applicable certificate.
5. **Download or print.** Use the PDF viewer's download or print options to save or print a copy.

Frequently Asked Questions

Accounts and OrgAdmin Access

How do I confirm my email address?	Open the Welcome to the CAAR Academy! email and select Confirm My Email Address. After confirmation, select Login and sign in with the password created during registration. Check your junk or spam folder if the email is missing.
How do I obtain OrgAdmin access?	Create and confirm your account, then email training@caar.org ; or an existing OrgAdmin in your organization can also grant access. Sign out and sign back in after access is granted.
Can our organization have more than one OrgAdmin?	Yes. CAAR or an existing OrgAdmin can grant access to another person who has an account connected to the correct organization. See Add Another OrgAdmin in Section 6.
Why can a first-time learner not sign in?	Learners added through Group Registration receive password reset instructions when they are first enrolled. Ask the learner to follow that email before signing in. Individuals who create their own accounts must confirm their email address. Check junk or spam folders and contact training@caar.org if assistance is needed.

Registration Payment and Course Access

Can I use Group Registration for one learner or myself?	Yes. Use Group Registration for organization registrations, whether registering one learner, several learners, or yourself.
Can I register learners for several courses at once?	No. Each Group Registration supports one course. Complete a separate registration for each additional course.
Does every learner need a unique email address?	Yes. Each learner needs a unique email address they can access. The address connects the learner to their account and training record.
How do I pay for a group registration?	Stripe opens automatically after you submit the Group Registration. Enter your credit card information, select Pay, and wait for confirmation before closing or refreshing the page.
Why did the payment fail?	Confirm that Billing Email and Province are completed under My Organization, then review the remaining billing details and card information. Contact training@caar.org if the problem continues.
When do learners receive course access?	Learners are enrolled after payment is successfully processed and receive an automated enrolment email. First-time learners also receive password reset instructions before signing in.
How do I confirm payment was successful?	On the Group Registration details page, Billing should display Paid, Course access should display Access active, and the invoice should have a zero outstanding balance.
Where can I find the paid invoice?	Select Group Registration, then View group progress. Open the applicable registration using View progress, then select View invoice under Organization billing.

Locations Progress and Certificates

Do I need to add office locations?	Only if your organization wants to associate learners with specific branches or offices. Add the location before assigning learners to it.
Are Head office and Active location the same setting?	No. Head office identifies the primary location. Active location makes a location available for assignment and use. Select Active location for every location that should be available.
Why does a learner not appear under Users & activity?	Confirm that the learner has been connected to the organization through Group Registration and that payment has been completed. Contact training@caar.org if the learner is still missing.
Where can I check learner progress and completion?	Select Group Registration, then View group progress. Select View progress beside the registration and scroll to Learner progress to review status, progress percentage, last activity, and completion date.
How can I access learner certificates?	Use Organization Certificates from the menu under your email address, then select PDF beside the certificate. Alternatively, open View progress for the applicable Group Registration and select View in the learner's Certificate column. Use the PDF viewer to download or print a copy.

www.caar-academy.org | Questions: training@caar.org or 204 989 9309