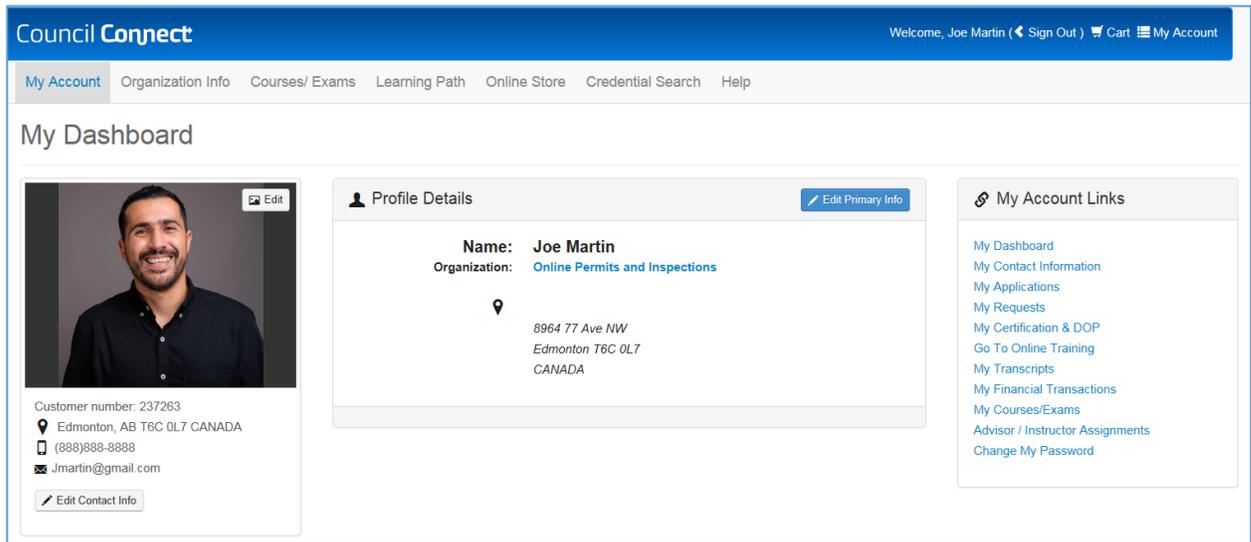


Organization Dashboard Information

This tutorial walks you through the steps to find and view your organization dashboard information. All tasks can be accessed from this **Dashboard**. Related tutorial resources with detailed steps for completing all such tasks can be accessed from the **Help** menu at the top of the **Dashboard**.

After logging on you will see the **My Dashboard** page. If you are set up as an **Account Admin** for your organization (or multiple organizations), you will see an **Organization Info** tab on the **My Dashboard** page, where you can access the organization information.

My Dashboard

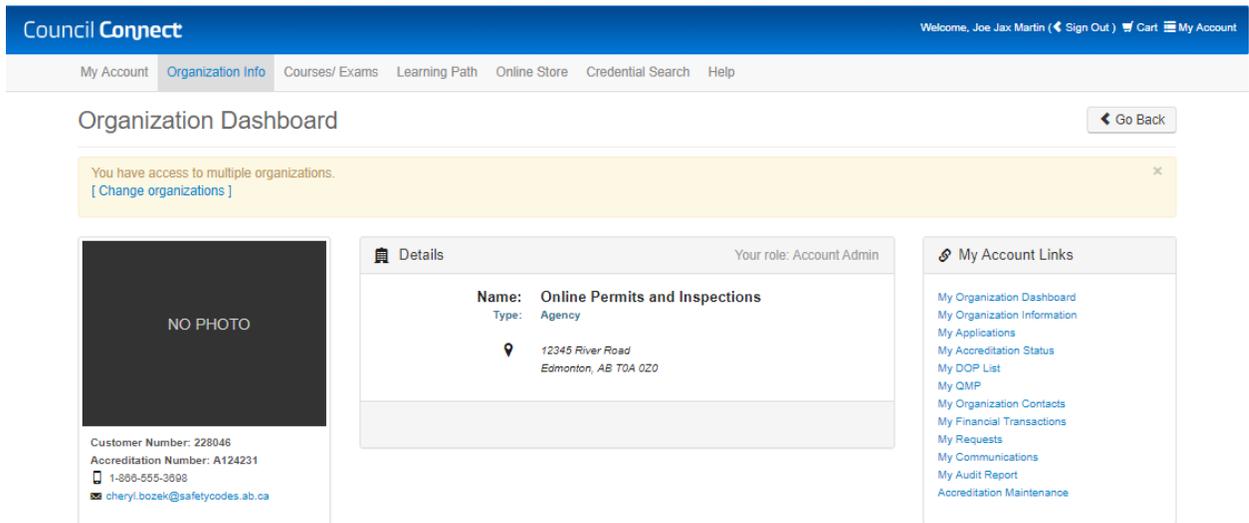


The screenshot displays the 'My Dashboard' page on the Council Connect website. The page is divided into several sections:

- Header:** 'Council Connect' logo on the left, and 'Welcome, Joe Martin (Sign Out) Cart My Account' on the right.
- Navigation:** A horizontal menu with 'My Account' (active), 'Organization Info', 'Courses/ Exams', 'Learning Path', 'Online Store', 'Credential Search', and 'Help'.
- My Dashboard:** The main content area, which includes:
 - Profile Details:** A section with a user photo, name 'Joe Martin', organization 'Online Permits and Inspections', and address '8964 77 Ave NW, Edmonton T6C 0L7 CANADA'. It includes an 'Edit Primary Info' button.
 - My Account Links:** A list of links: 'My Dashboard', 'My Contact Information', 'My Applications', 'My Requests', 'My Certification & DOP', 'Go To Online Training', 'My Transcripts', 'My Financial Transactions', 'My Courses/Exams', 'Advisor / Instructor Assignments', and 'Change My Password'.
 - Contact Info:** A section with a photo, customer number '237263', address 'Edmonton, AB T6C 0L7 CANADA', phone '(888)888-8888', email 'Jmartin@gmail.com', and an 'Edit Contact Info' button.

1. From **My Dashboard**:
 - a. Click on **Organization Info**

Organization Dashboard



Your organizational dashboard is organized into two main sections: upper and lower.

2. The Upper Section consists of:

a. **Menu Bar:**

- i. **My Account:** quick return to your **My Dashboard** to access your personal dashboard from any page
- ii. **Organization Info:** view your **Organization Dashboard** information
- iii. **Courses/Exams:** search for or register for courses and exams. Individual registrations will be on the individual's account who is logged on, not the organization. Group registrations that are paid by an organization can be done here, with the exception of in-house registrations. To request an in-house registration, contact the Council.
- iv. **Learning Path:** to learn about the course and exam requirements for any discipline
- v. **Online Store:** search for and purchase merchandise (e.g. replacement cards) or publications (i.e. course materials). All online store purchases made will be on individual account who is logged in, not the organization.
- vi. **Credential Search:** search for master electricians, safety codes officers, or accredited businesses
- vii. **Help:** access Resources (for PDF and video tutorials), or Contact Us (to submit a request for information)

b. Organization information (below menu bar):

- i. **Change Organizations:** displays if you are the account admin for more than one organization. Click **Change Organizations** to switch from one organization to another.
- ii. **Left panel:** customer number, phone number, fax number, address and email address
- iii. **Centre panel:** organization name, type, address
- iv. **Edit Organization** button: click to edit your organization information

c. **My Account Links:** for quick access to Council Connect tasks and information

- i. **My Organization Dashboard:** quick return to your organization home page
- ii. **My Organization Information:** add or edit phone numbers, addresses, email addresses
- iii. **My Applications:** your organization's open accreditation applications
- iv. **My Accreditation Status:** your organization's accreditations
- v. **My DOP List:** your organizations DOPs

- vi. **My QMP:** your organization's QMPs
- vii. **My Organization Contacts:** all individuals associated with the organization
- viii. **My Financial Transactions:** pay, view, and print all invoices and payments
- ix. **My Requests:** requests created through Contact Us
- x. **My Communications:** log of notifications and communications
- xi. **My Internal Reviews:** your internal reviews
- xii. **My Audit Report:** your organization's audits
- xiii. **Accreditation Maintenance:** link to screen to start accreditation change applications

Note: Refer to the tutorials in HELP for detailed instructions to complete any of the above tasks.

▼ My Accreditation Status								
Discipline	Accreditation Number	Scope	Order Number	Status	Accreditation Date	Issue Date	Effective Date	Order Of Accreditation
Fire	A124231	full	3099	Active	10/18/2018	10/18/2018	10/18/2018	
Building	A124231	full	3097	Active	10/18/2018	10/18/2018	10/18/2018	
Electrical	A124231	full	3098	Active	10/18/2018	10/18/2018	10/18/2018	
Plumbing	A124231	full	3101	Active	10/18/2018	10/18/2018	10/18/2018	
Gas	A124231	full	3100	Active	10/18/2018	10/18/2018	10/18/2018	

▼ My Open Applications		
Application Type	Start Date	Status
<input type="button" value="⚙️ Apply Now"/>		

▼ QMPs					
QMP Status	Received Date	Approved Date	Accreditations	Document	QMP Manager

▼ Audits								
Audit Year	Audit Status	Audit Type	Audit Period	Completion Date	Disciplines	Document	Report Mailed	Audit Lead

▼ Annual Internal Review Documents				
AIR Year	Discipline	Approved Date	Document	QMP Manager
2017		04/10/2019	AIR_Final_228048_1	Martin Joe Jax

3. The **Lower Section** consists of:
 - a. **My Accreditation Status:** displays current accreditations
 - b. **My Open Applications:** displays open accreditation applications
 - i. **Add Accreditation:** apply for a new single accreditation
 - ii. **Add Joint Accreditation:** apply for joint accreditation
 - iii. **Continue Application:** access your accreditation applications in progress
 - iv. **Apply Now:** start a new application
 - c. **My QMPs:** displays any QMPs
 - d. **Audits:** displays audits
 - e. **Annual Internal Review Documents:** list of approved annual internal review documents

Note: Click the **arrows** to expand or collapse the forms.

Saving a Local Copy, Exporting or Printing a List from the Organization Dashboard

My DOP List (Online Permits and Inspections)

[Back to My Organization Dashboard](#)
[My Account Menu ▾](#)

▼ My DOP Applications								 Export to Excel
SCO Name	DOP Number	SCO Number	Discipline	Scope	Date issued	Status	SCO Expire Date	
Mr. Paul The Plumber			Building	Standard		Pending Approval	Jun 13 2022	
Mr. Paul The Plumber			Building	Standard		Pending Approval	Jun 13 2022	
Mr. Paul The Plumber			Building	Standard		Pending Approval	Jun 13 2022	
Mr. Paul The Plumber			Building	Standard		Pending Approval	Jun 13 2022	
Mr. Paul The Plumber			Plumbing	Standard		Pending Approval	Jun 13 2022	

[Add DOP](#)

▼ My Active DOP List								 Export to Excel
SCO Name	DOP Number	SCO Number	Discipline	Scope	Date issued	Status	SCO Expire Date	
Connor Jax Hill			Plumbing	Standard	2018-10-18	Active	Oct 17 2021	
Mr. Paul The Plumber			Fire	Standard	2019-02-07	Active	Jun 13 2022	
Mr. Paul The Plumber			Gas	Standard	2019-04-02	Active	Jun 13 2022	
Mr. Paul The Plumber			Building	Standard	2019-04-02	Active	Jun 13 2022	
Teagan Connolly			Building	Standard	2019-04-02	Active	Oct 31 2019	

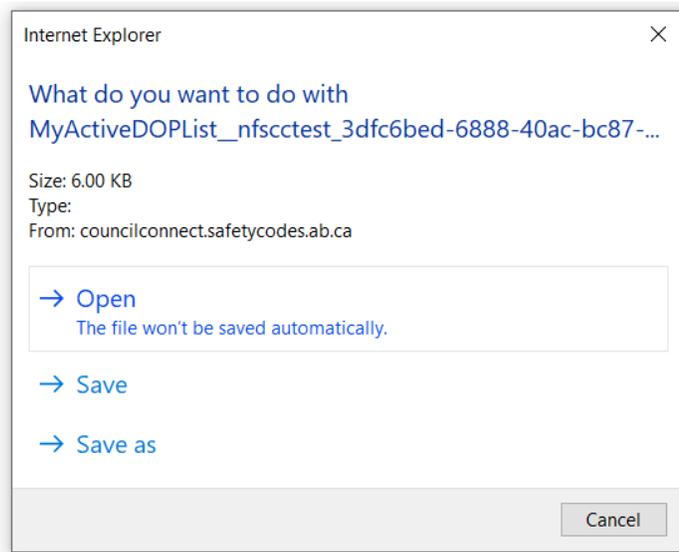
▼ My Inactive DOP List								 Export to Excel
SCO Name	DOP Number	SCO Number	Discipline	Scope	Date issued	Status	SCO Expire Date	
Connor Jax Hill			Building	Standard	2018-10-18	Terminated	Feb 14 2019	

The following screens (accessible from the **My Account Links** menu) include an “**export to Excel**” button. Use this button to export the items in the associated list to Excel (which can then be saved locally, printed or emailed, etc.).

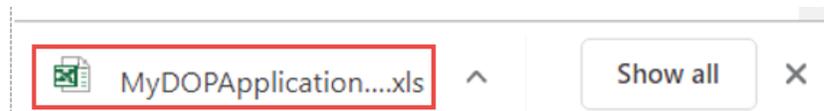
1. **My Applications link**
 - a. My Open Applications
 - b. My Completed Applications
2. **My Financial Transactions Link**
 - a. My Open Invoices
 - b. All Invoices
3. **My DOP List link**
 - a. My DOP Applications
 - b. My Active DOP List
 - c. My Inactive DOP List
4. **My Organization Contacts Link**
 - a. My Contacts
5. **My Requests Link**
 - a. My Requests
6. **My Communications Link**
 - a. My Communications

To export a list of the records in any of the above noted lists:

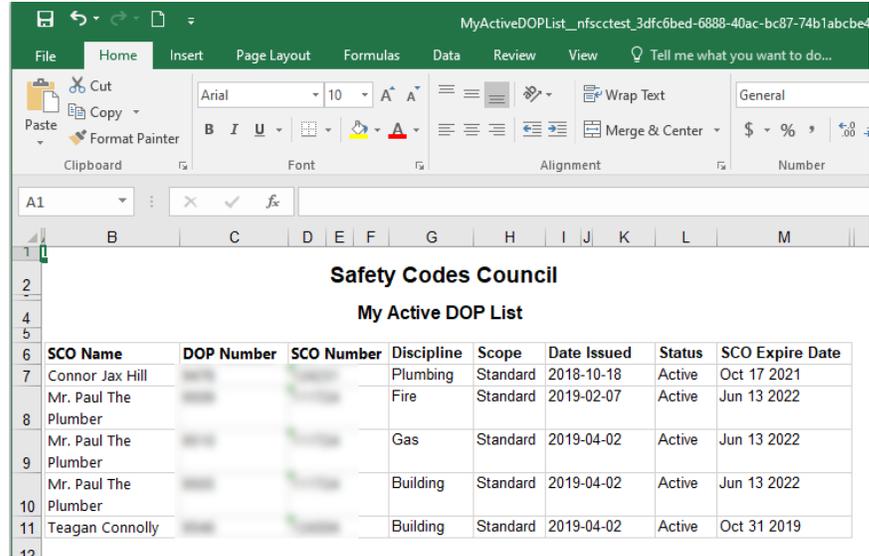
7. Click the **Export to Excel** button
8. The browser you are using determines how the export file will be made available



9. If using **Internet Explorer**, you can choose to either **Open** the file or **Save** it to a local drive and open from there.



10. If using **Google Chrome** a new tab with a link to the exported list(s) displays at the bottom of the Council Connect window.
11. Click the export file to open it in Excel.



Safety Codes Council
My Active DOP List

SCO Name	DOP Number	SCO Number	Discipline	Scope	Date Issued	Status	SCO Expire Date
Connor Jax Hill			Plumbing	Standard	2018-10-18	Active	Oct 17 2021
Mr. Paul The Plumber			Fire	Standard	2019-02-07	Active	Jun 13 2022
Mr. Paul The Plumber			Gas	Standard	2019-04-02	Active	Jun 13 2022
Mr. Paul The Plumber			Building	Standard	2019-04-02	Active	Jun 13 2022
Teagan Connolly			Building	Standard	2019-04-02	Active	Oct 31 2019

12. Once the file is opened in Excel it can be saved locally, printed or emailed, etc.