cadac

MODULE 1
INTRODUCTION TO CADAC

Version 1.0   **December 2022**

FIGURES

1.1 WELCOME TO CADAC

MISSION AND VISION OF CADAC

About CADAC
CADAC (Canadian Arts Data / Donnée sur les arts au Canada) is a joint effort of arts funders across the country and is dedicated to the collection, dissemination, and analysis of financial and statistical information about Canadian arts organizations in a system of record. CADAC provides a simplified process, standardized forms and a web-based application to arts organizations applying for operating (core) grants to submit financial and statistical information for use by funding agencies.

The new CADAC system was developed in 2022 by the Canada Council for the Arts, in collaboration with the CADAC members, as its strong commitment to foster sectoral collaboration and sharing of knowledge within the arts sector, and to promote the value of the public investment in the arts.

CADAC Mission
CADAC's mission is to collect and make available consistent and credible financial and statistical data on publicly funded arts organizations in Canada. CADAC creates efficiencies and opportunities for arts funders and arts organizations by:

- Providing common financial and statistical forms.
- Improving accountability and transparency for both funders and applications by reviewing and validating financial data.
- Providing reliable data for assessment processes, research, policy and program. development, performance measurement and evaluation.
- Providing data that helps demonstrate the value and reach of public funding of the arts.

CADAC Vision
CADAC's vision is to provide reliable data for the benefit of the arts in Canada. For reasons of accountability, transparency, and sound decision-making, accurate data is crucial for public funding agencies and to the sector overall. By working together to improve the quality and availability of data on the arts in Canada, CADAC is contributing to an environment in which both funding agencies and arts organizations are better positioned to do their work.

WHY CADAC?

Benefits for Arts Organizations

Canadian arts organizations applying to one or multiple funding agencies for operating (core) grants submit their financial and statistical information in a single format, to a single platform. They also have access to their own historical data and to reports on their own organization and comparative reports to all similar organizations in the database.

Benefits for Funding Agencies

Public sector funding agencies have immediate access to current and consistent data for all the arts organizations they fund. Aggregate data across CADAC is also accessible, allowing for reliable and consistent financial and statistical analysis of the Canadian arts sector. Individually and collectively, funding agencies will be able to report on the health of their organizations and the impact of the arts in their communities.

The participating funding agencies (CADAC Members) are part of a Master Service Agreement. Click here to find the arts funding agencies participating in the CADAC.

REGISTRATION PROCESS

In order to sign in to CADAC, you must first register your agency/organization. The registration process is different for agencies and organizations. Please refer to the Signing In section in Module 1.2 Sign In Experience for step-by-step instructions on how to sign in.

Agency Experience

For agencies, once they have signed a Master Services Agreement (MSA), a CADAC administrator will create the agency profile and send an email invitation for the main contact at the agency (Agency Supervisor) to create their account in CADAC. The Agency Supervisor can then send out email invitations to other agency users. Both Agency Supervisors and Agency Users can invite organizations to use CADAC.

Organization Experience

For an organization, the first step is to verify their eligibility to receive core funding with a Program Officer (from their funding agency) and to confirm if a CADAC profile is needed for that grant program. If the organization is eligible, the Program Officer will send the organization's primary user an email invitation to register their organization in CADAC. The organization registration must be done by the primary user of CADAC (Organization Supervisor). If the Organization Supervisor is a new CADAC user, they must first register their user account using the invitation link. With a user account, the Organization Supervisor can then update the organization profile to complete the organization's registration. Once the organization is successfully registered, the Organization Supervisor can then invite other users to join the organization.

Please refer to the [User](#) and [Organization](#) Registration sections in Module 1.1 Welcome to CADAC for step-by-step instructions on how to register in CADAC.

Registration Process Flow

This is an overview of the registration process for arts organizations. The process starts when an agency becomes a CADAC member and ends when the organization profile is updated. Figure 1 shows the registration process flow organized by the responsibilities of CADAC, agencies, and organizations.

For an organization, the first step is to verify their eligibility to receive core funding with a Program Officer (from their funding agency) and to confirm if a CADAC profile is needed for that grant program. If the organization is eligible, the Program Officer will send the organization's primary user an email invitation to register their organization in CADAC. The organization registration must be done by the primary user of CADAC (Organization Supervisor). If the Organization Supervisor is a new CADAC user, they must first register their user account using the invitation link. With a user account, the Organization Supervisor can then update the organization profile to complete the organization's registration. Once the organization is successfully registered, the Organization Supervisor can then invite other users to join the organization.

For more information about user roles in CADAC, please see the *CADAC User Roles for organizations* and the *CADAC User Roles for Agencies* documents on the cadac.ca training page.
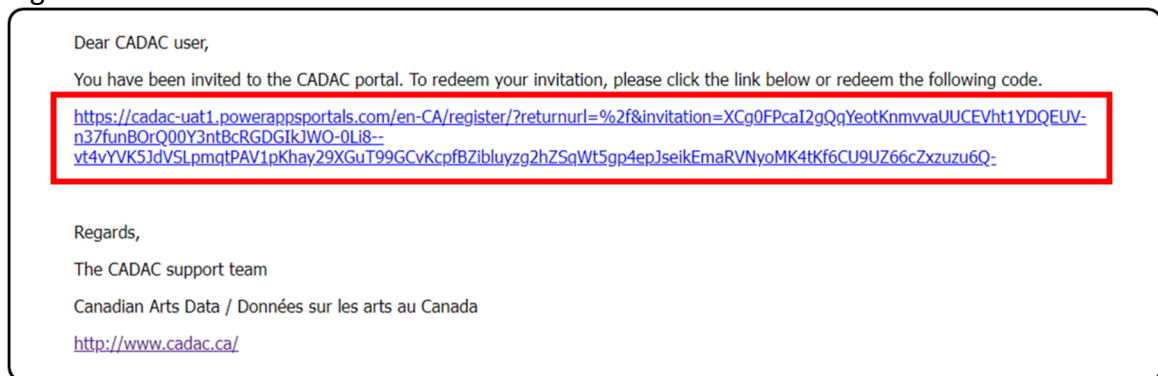
Figure 1 - Registration Process Flow
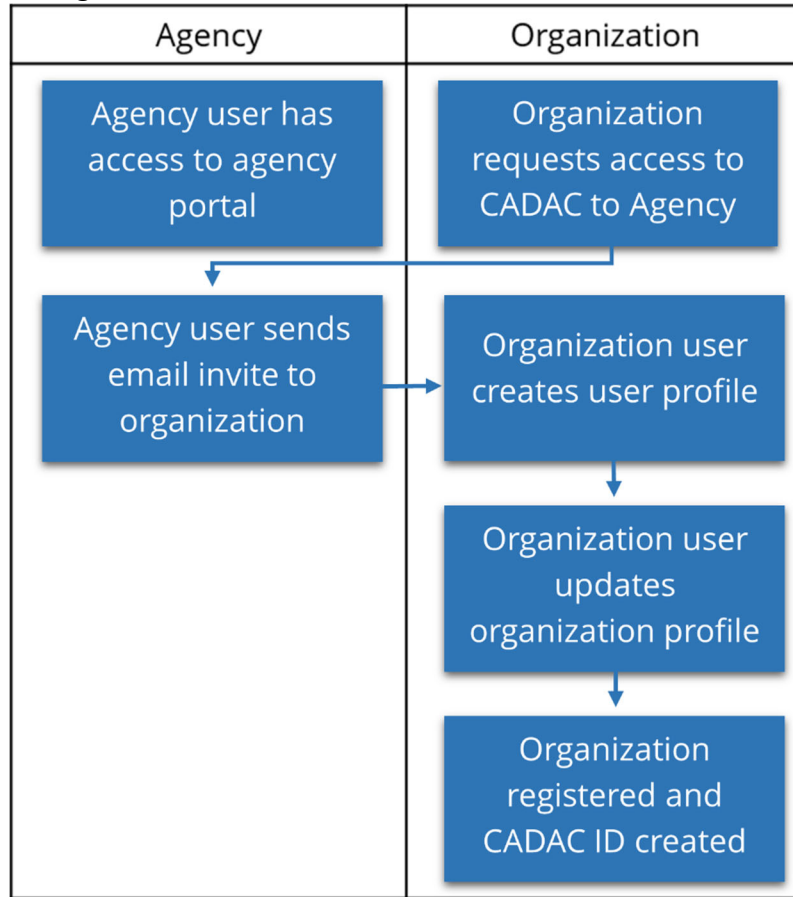
User Registration

To register your account, follow the steps below after receiving the email invitation (Figure 2):

1. Click on the link in your email.

Figure 2 - Email Invitation

2. The link will bring you to the *Sign in* page in CADAC (Figure 3). The invitation code will automatically load. Click **Register**.

Figure 3 - Invitation Code

3. You are now on the *Register* page (Figure 4). Enter the required information to create your own user profile and then click **Register**.

Note: The red asterisks (*) denote required fields. See the table below for detailed information about the fields.

Figure 4 - User Registration

1 Choose your preferred language, English or French.

2 Enter your first name.

3 Enter your last name.

4 Enter your job title.

5 Enter your work phone number.

6 Your email is automatically loaded and cannot be changed.

7 Enter a password. It must follow these requirements:
   - At least 8 characters long
   - At least one uppercase letter
   - At least one lowercase letter
   - At least one special character, e.g., ? @ # }

8 Re-enter the password.

4. You are now on the *Terms of Use* page (Figure 5). Read the Terms of Use and click on the checkbox to agree to the terms and conditions. Click **Continue**.

Figure 5 - Terms of Use

5. You are redirected to the *User Profile* page (Figure 6). You have successfully created your user profile.

Figure 6 - User Profile


Organization Registration

If you are a new CADAC user, you must first create your account using the email invitation you received (see User Registration). If you are an existing CADAC user, you will receive an email to inform you that your account has been linked to a temporary organization profile. To complete the organization registration, you must update the organization profile. Follow the steps below:

1. Go to **Organization(s)** found on the menu at the top of the page (Figure 7).

Figure 7 - Organization(s)
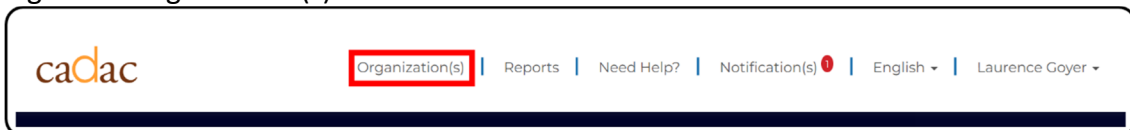
2. A new organization profile would have been created (Figure 8). It is listed in the table, but the columns are empty because there is no information yet. To update the organization profile, open the Actions drop-down menu for the new organization and click on **Edit Organization**.

Figure 8 - Edit Organization
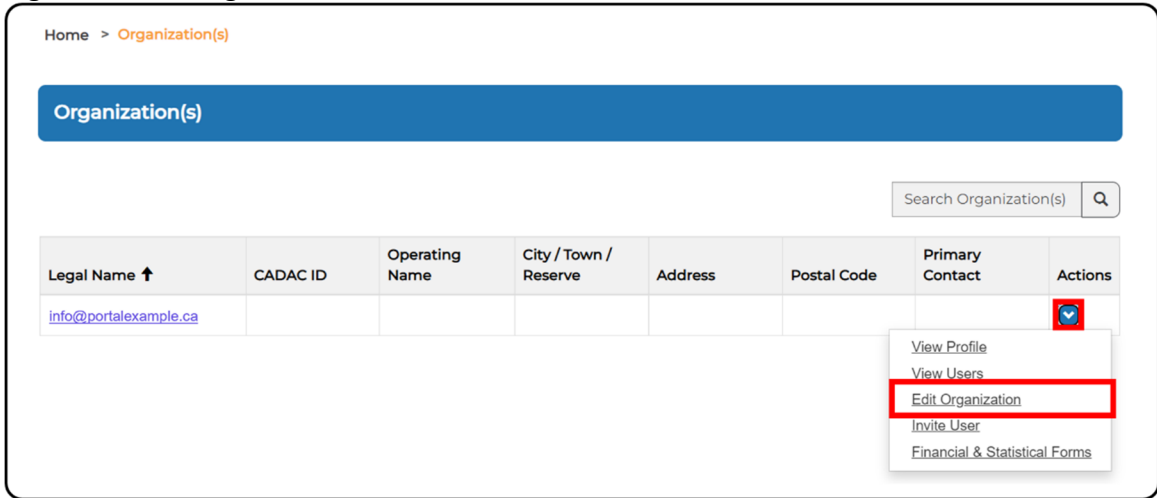
3. Enter the required fields about the organization's general information (Figure 9).

    Note: The red asterisks (*) denote required fields. See the table below for detailed information about the fields.

Figure 9 - General Information

1 **The legal name is pre-populated with your email address. Delete this email address and enter the organization's Legal Name.**

Note: This is a critical process to generate the CADAC ID. Without this process, the organization's registration will not be complete.

2 Enter the organization's Operating Name(s).

3 Enter the organization's Website.

4 Enter the organization's Address. Select the address from the drop-down menu. The City / Town / Reserve, Province / Territory, and Postal Code should be auto populated.

5 The organization's City / Town / Reserve will pre-populate once the address is selected from the drop-down menu.

⑥ The organization's Province / Territory will pre-populate once the address is selected from the drop-down menu.

⑦ The organization's Postal Code will pre-populate once the address is selected from the drop-down menu.

Note: If the legal name or operating name is the same as an existing organization in CADAC, you will receive an error message for a duplicate. Confirm with your organization if an account has already been created. If problems persist, please contact CADAC at cadacinfo@cadac.ca.

4. Enter the required fields about the organization's Fiscal Year End, incorporation details, charitable organization details (Figure 10).

Note: The red asterisks (*) denote required fields. See the table below for detailed information about the fields.

Figure 10 - Financial Information

① Select the organization's Fiscal Year End month from the drop-down menu.

② Select the organization's Fiscal Year End Day from the drop-down menu.

③ Indicate whether the organization is Incorporated or not. If it is Incorporated:
   - Enter the Incorporation Number
   - Indicate if it is Provincial or Federal

④ Enter your Business Number (BN)

⑤ Choose the Type of Organization from the drop-down menu.

⑥ Indicate whether the organization is a Federally Registered Charitable Organization or not. If it is, enter the Federal Charity Number.

5. Enter the information about the Organization's Discipline, Specialization(s), and Practice(s) (Figure 11). These are all required fields.

Note: See the table below for detailed information about the fields. For more information about editing these fields, please see the *Using CADAC as an Arts Organization* document on the cadac.ca training page.

Figure 11 - Disciple, Specialization, and Practice

① Choose the Organization's Discipline from the drop-down menu.

② Enter the organization's Specialization(s) by clicking **Add Specialization**. Select a specialization from the drop-down menu. If the organization does not have a

specialization, choose Not Applicable. Click **Add Specialization**. The specialization will appear in the list. You can add more than one specialization.

(3) Enter the organization's Practice(s) by clicking **Add Practice**. Select a practice from the drop-down menu. If the organization does not have a Practice, choose Not applicable. Click **Add Practice**. The practice will appear in the list. You can add more than one Practice.

6. Under Opt-Out Acceptance (Figure 12), choose if you want to opt-out of sharing your organization's data with all the CADAC agencies to complete your organization's profile. **The default is set to share the organization's data** with all the CADAC agencies. Click **Save**.

> **Note:** If you did not fill a mandatory field, you will get an error message stating that the form could not be submitted. It will list the fields that are missing. Complete the missing fields and click **Save**.

Figure 12 - Opt-Out Acceptance and Save

7. The organization profile is complete. Go to the *Organization(s)* page and you will see that the organization's information is now showing in the table including the CADAC ID (Figure 13).

Figure 13 - Completed Organization Profile

Note: If the legal name is not changed from the preloaded email address, the CADAC ID will not be generated, and the organization registration will not be complete.

TERMS OF USE

The terms of use agreement defines rules for the use of the CADAC website. It is a legal agreement between CADAC and its users. The terms include disclaimers and notices clarifying the limit of the website's liability to the user. It also displays other information about CADAC's ownership and copyright to help protect its content.

Every CADAC user must read and accept the terms of use before using CADAC. If they choose to decline the terms, they will not be able to use CADAC.

1.2 SIGN IN EXPERIENCE

SIGN IN AND SIGN OUT

Sign In Page

From the *Home* page, click on Sign in to go to the Sign In page (Figure 14). Here you can enter your sign in credentials and start your session or reset your password if you have forgotten it. Please refer to the [Access and Password](#) section in *Module 1.2 Sign in Experience* for step-by-step instructions on how to reset your password if you have forgotten it.

Figure 14 - Sign In Page
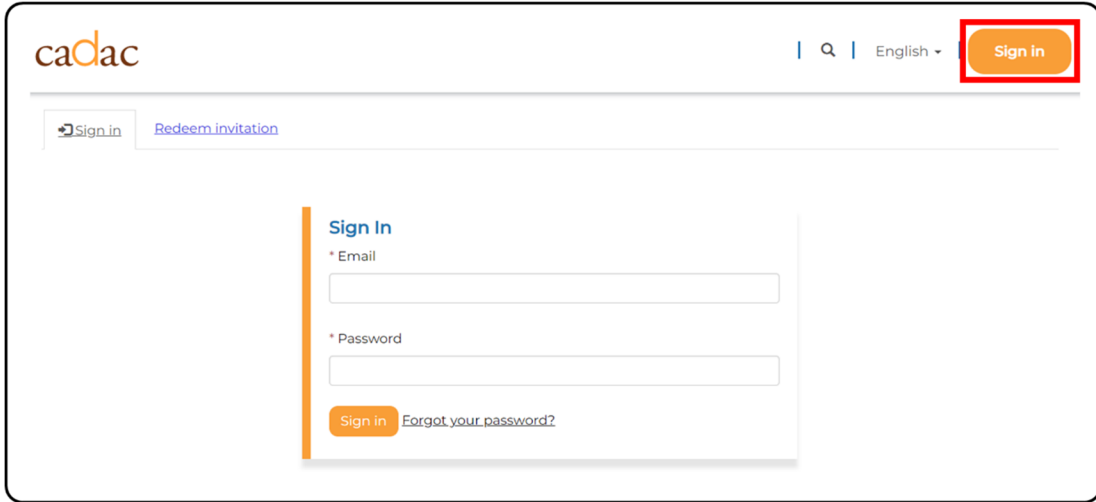
Signing In

To sign in to CADAC, follow the steps below:

1. In your web browser address field, enter https://www.cadac.ca/.
2. The *Home* page is displayed (Figure 15). Click **Sign in** to go to the *Sign In* page.

Figure 15 - Home Page

3. Enter your email and password. Then click **Sign in** to sign in to CADAC (Figure 16).

Figure 16 - Sign In page
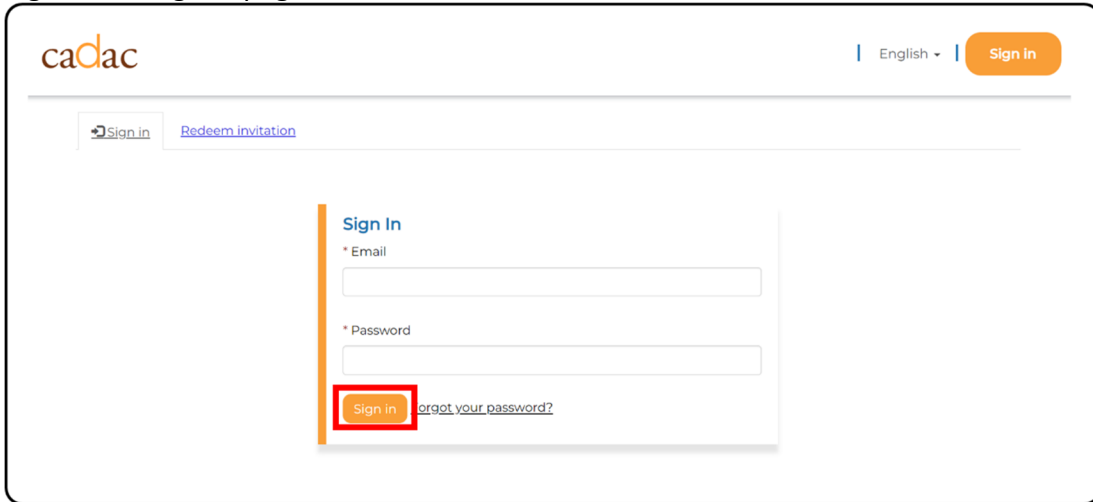
Note: For security purposes, if you enter your password incorrectly five consecutive times, the system will temporarily lock your account and you will not be able to sign in to CADAC. If this occurs, please contact the CADAC Administrator at cadacinfo@cadac.ca to unlock your account.
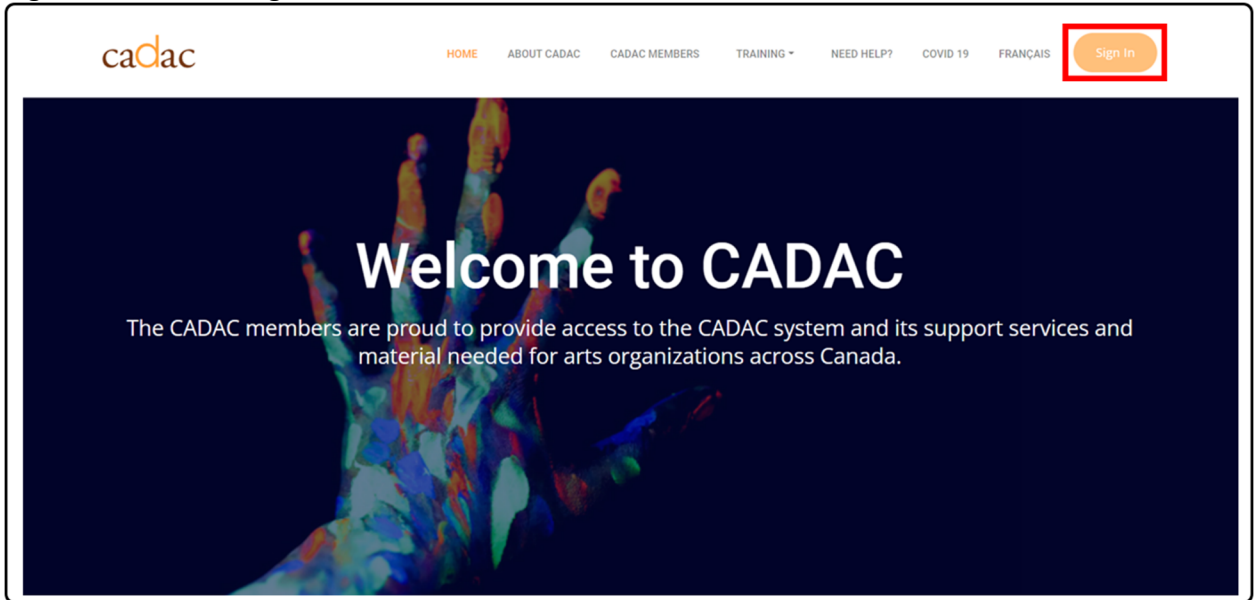
Signing Out

To sign out of CADAC, follow the steps below:

1. Click on your name in the top right corner of the CADAC menu (Figure 17).

Figure 17 - CADAC menu
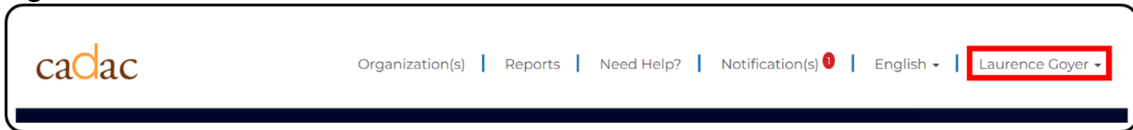
2. A drop-down menu will appear (Figure 18). Click **Sign out**.

Figure 18 - Sign Out

3. You are now signed out and will be redirected to the *Home* page.

Note: Do not exit CADAC by closing the browser. To ensure that the connection between your profile and the CADAC server is severed, you should always click **Sign out** to exit CADAC before closing the browser.
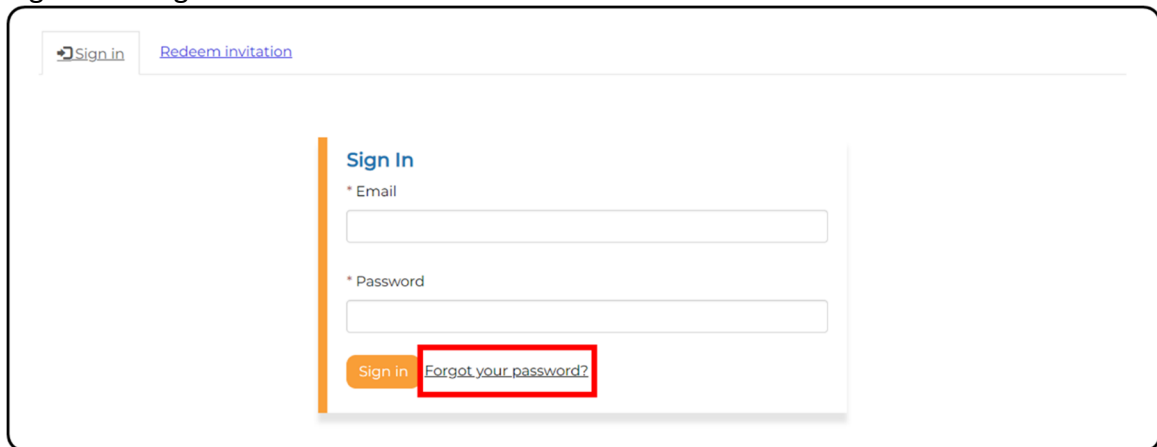
PASSWORD AND PROFILE

How to Reset Your Password
If you have forgotten your password, follow the steps below:
1. In the *Sign In* page (Figure 19), click **Forgot your password?** beside the Sign in button.
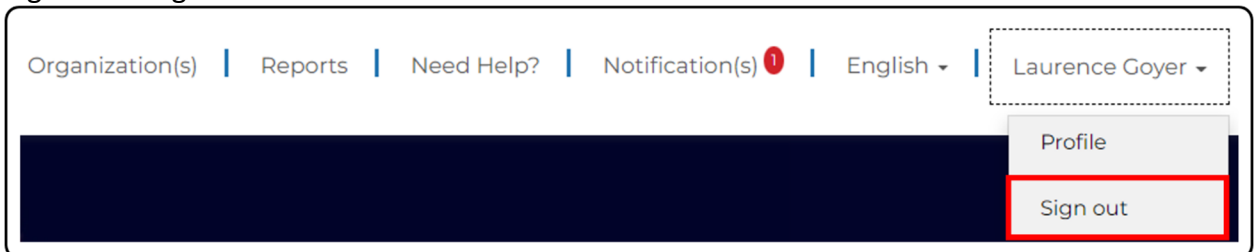
Figure 19 - Sign In

2. The *Forgot your password?* page is displayed (Figure 20). Enter your email and click **Send**.

Figure 20 - Forgot your password?

3. You will receive an email with a link to reset your password (Figure 21). Click on **Reset Password**. Alternatively, you can copy and paste the URL into your web browser.

Figure 21 - Email Link

A password reset was requested for your account. Please click the following link to start the password reset process.

Reset Password

Or you can copy the following URL and paste it into your web browser.

https://ep-cadac-dev.powerappsportals.com/en-CA/Account/Login/ResetPassword?userId=b34956eb-f9d5-ec11-a7b5-0022483c5704&code=ikvcF9AYdHn0ND%2FnmxwgZG3s4EEpvnaiw9yczbMc1A%2BqfY8Cn%2FaERd4tUeVrjduF%2FI4Fng1OG;

If you believe you received this email in error, please contact Customer Service for assistance.

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.

Thank You,

Customer Service

4. The link will open the *Reset password* page (Figure 22). Enter your new password and re-enter it in the Confirm new password field. It must follow these requirements:
   - At least 8 characters long
   - At least one uppercase letter
   - At least one lowercase letter
   - At least one special character, e.g., & ? @ }

   Then click **Reset**.

Figure 22 - Reset Password

Reset password

New password   [_____]

Confirm new password   [_____]

Reset

5. You will receive a notification that your password has been reset (Figure 23). Click on **Sign in** to sign in to CADAC with your new password.

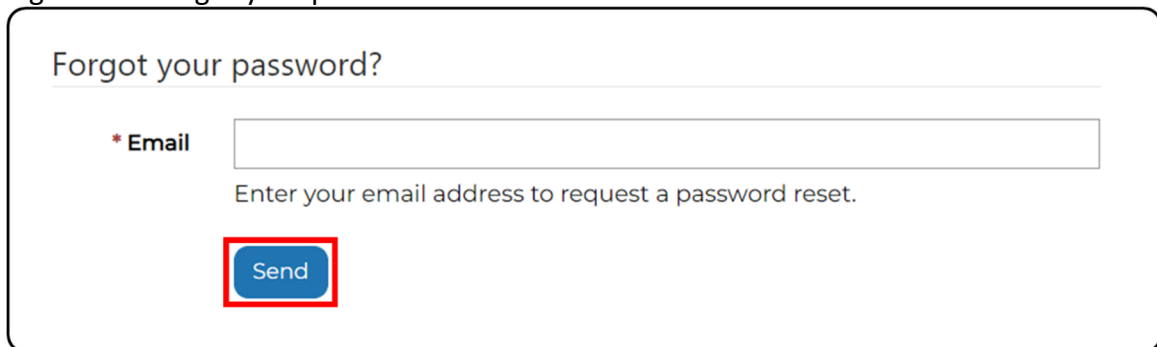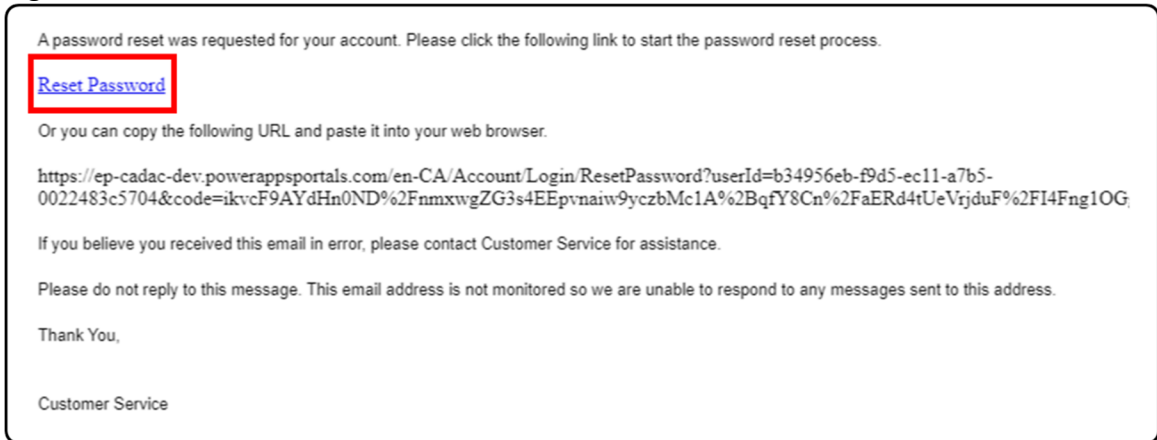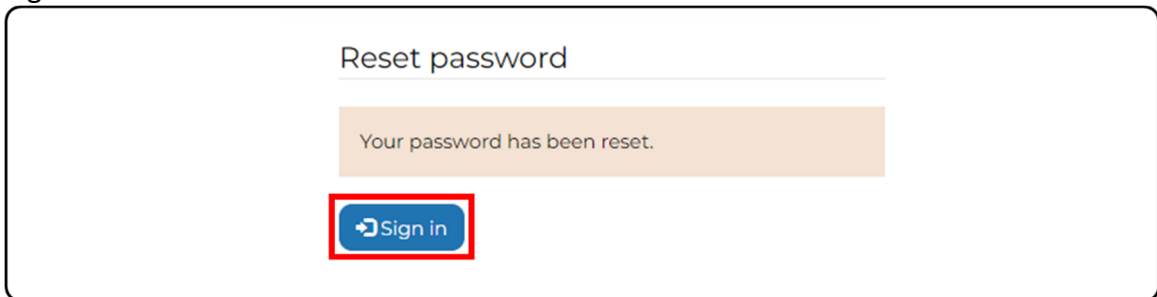Figure 23 - Reset Password Notification

Reset password
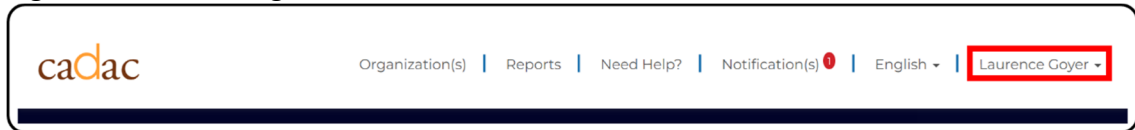
Your password has been reset.

🔓 Sign in

How to Change Your Password

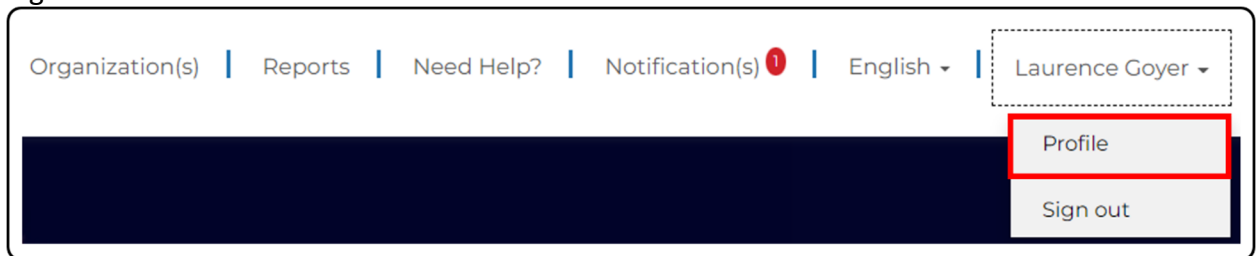If you want to change your password, follow the steps below:

1. After signing in, click on your name in the top right corner of the CADAC menu (Figure 24).
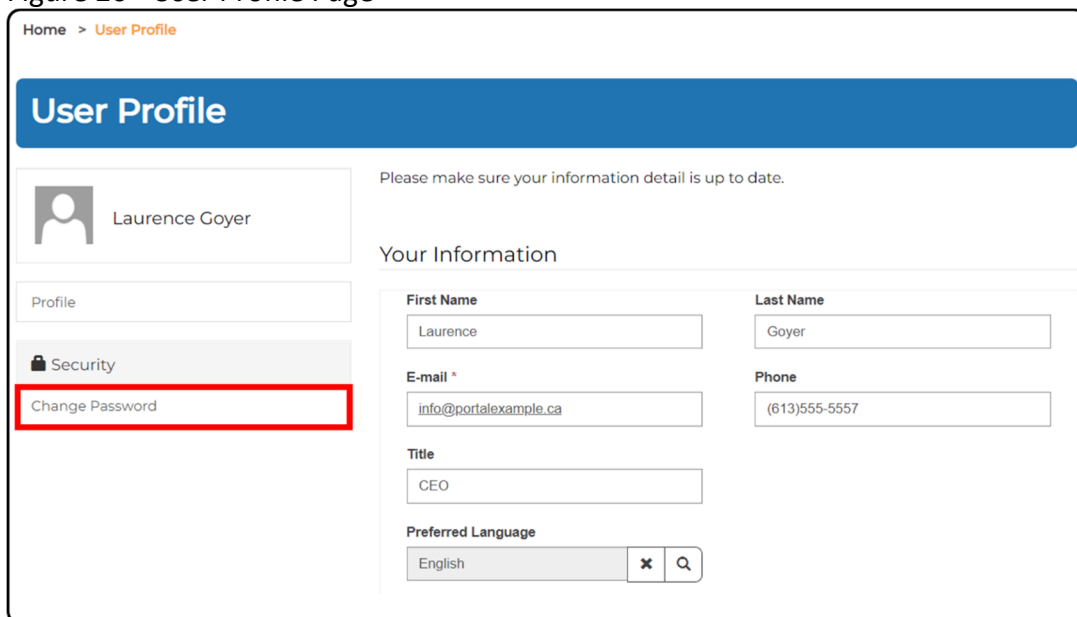
Figure 24 - Home Page

2. A drop-down menu will appear (Figure 25). Click on **Profile**.
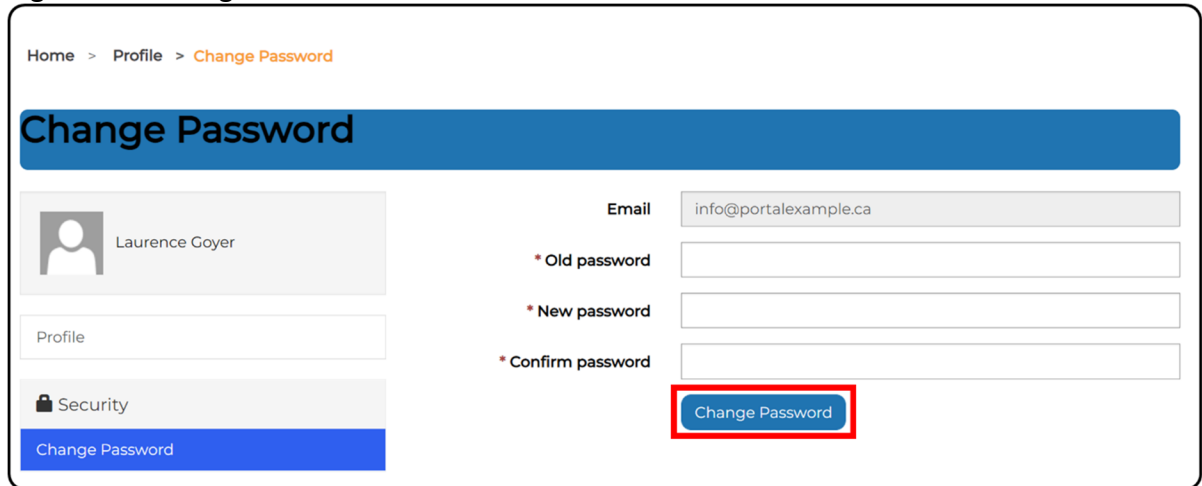
Figure 25 - Profile

3. The *User Profile* page will display (Figure 26). Click on **Change Password** on the left-hand side under the Security heading.

Figure 26 - User Profile Page

4. Enter in your old password. Enter in your new password and repeat it in the Confirm password field (Figure 27). It must follow these requirements:
   - At least 8 characters long
   - At least one uppercase letter
   - At least one lowercase letter
   - At least one special character, e.g., & ? @ }

   Then click **Change Password**.

Figure 27 - Change Password

5. You will be redirected to the *User Profile* page and a notification will appear stating that your password has been successfully changed.

Session Timeout

For security purposes, the CADAC webpage will timeout after 57 minutes of inactivity. A notification will appear asking you to sign out or stay signed in (Figure 28). If you do not choose any of the options, the CADAC webpage will automatically sign you out after three minutes. Please remember to save often so that you don't lose your work.

Figure 28 - Timeout Notification
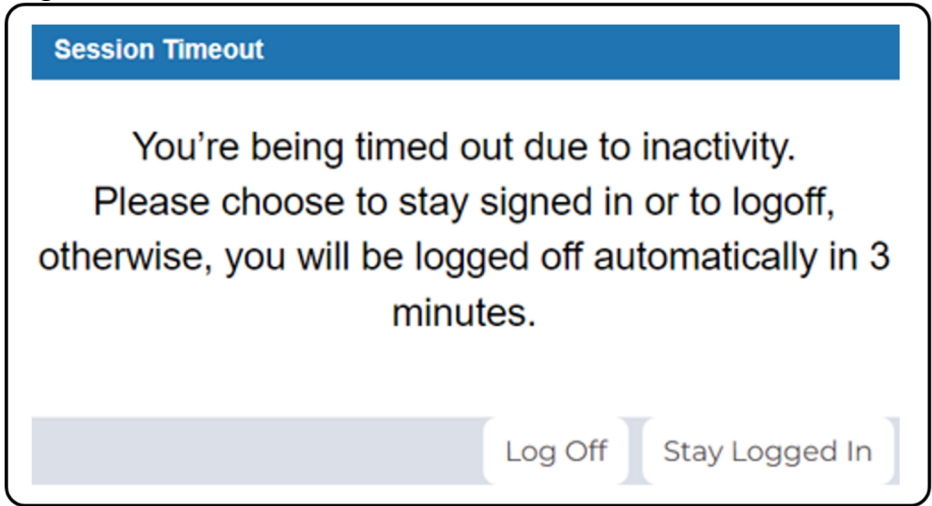
1.3 HOW TO NAVIGATE IN CADAC

NAVIGATING IN CADAC FOR ALL USERS

Browser Menu and Icons

In addition to the website breadcrumbs (Figure 29), you can also use your Web browser's Forward and Back buttons to navigate within CADAC (Figure 30). You can also use the Refresh button to reload the page.
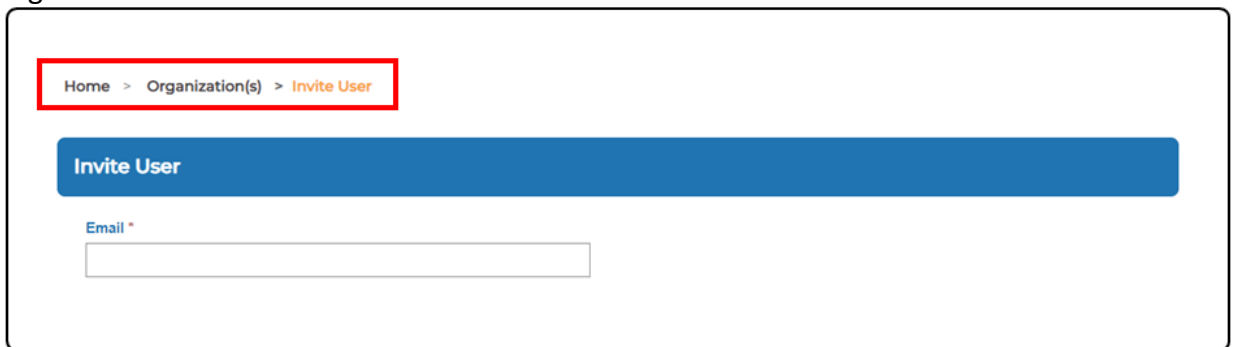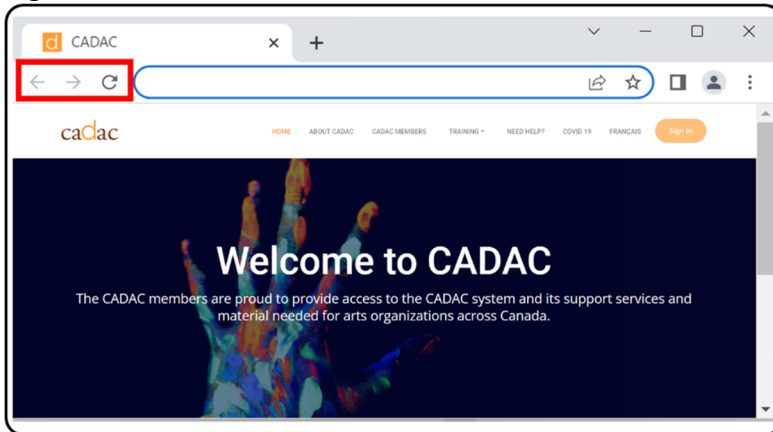
Figure 29 - Website Breadcrumbs

Figure 30 - Chrome Web Browser

Note: Entering data using CADAC requires you to save progress. You will be provided with confirmation. Leaving a CADAC window without saving will cause any inputted data to be lost.

Home Page CADAC Menu

The *Home* page (Figure 31) provides all users with the ability to sign in, view About CADAC, view CADAC Members, access CADAC Training, view the Help Page, view information on COVID 19, and change the language.
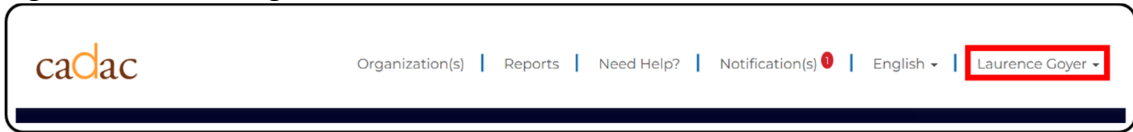
Figure 31 - Home Page Menu
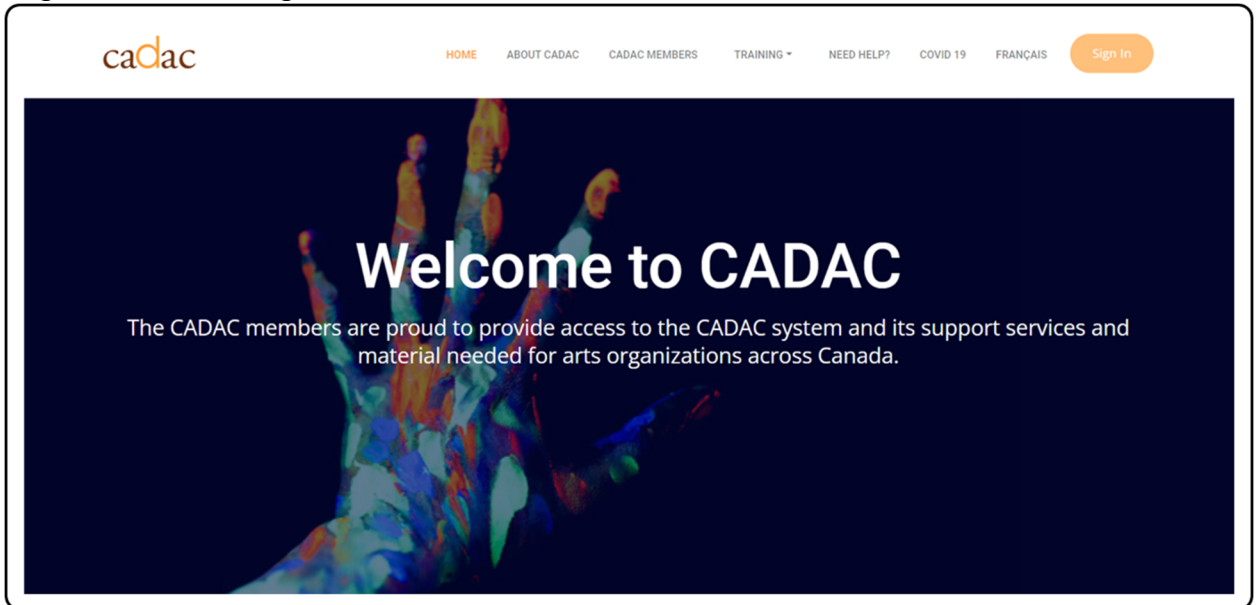
How to Update Your Profile

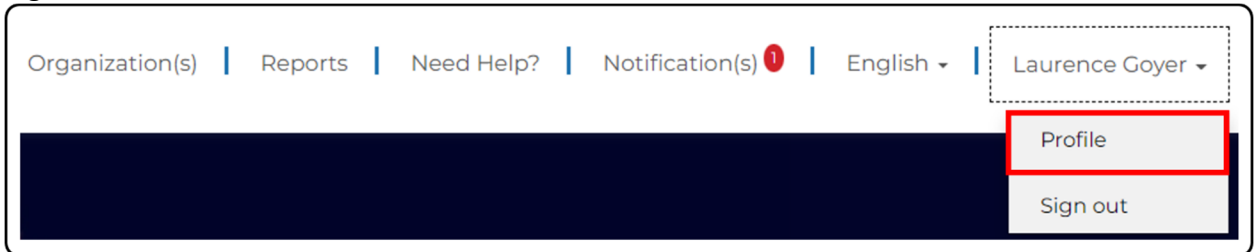To update your profile information, follow the steps below:

1. After signing in, click on your name in the top right corner of the CADAC menu (Figure 32).

Figure 32 - Home Page

2. A drop-down menu will appear (Figure 33). Click on **Profile**.

Figure 33 - Profile

3. The *User Profile* page will display (Figure 34). Update the information in any of the fields. Pleaser note that if you change your email address, you will need to use that email to sign in from then on. Click **Update**.
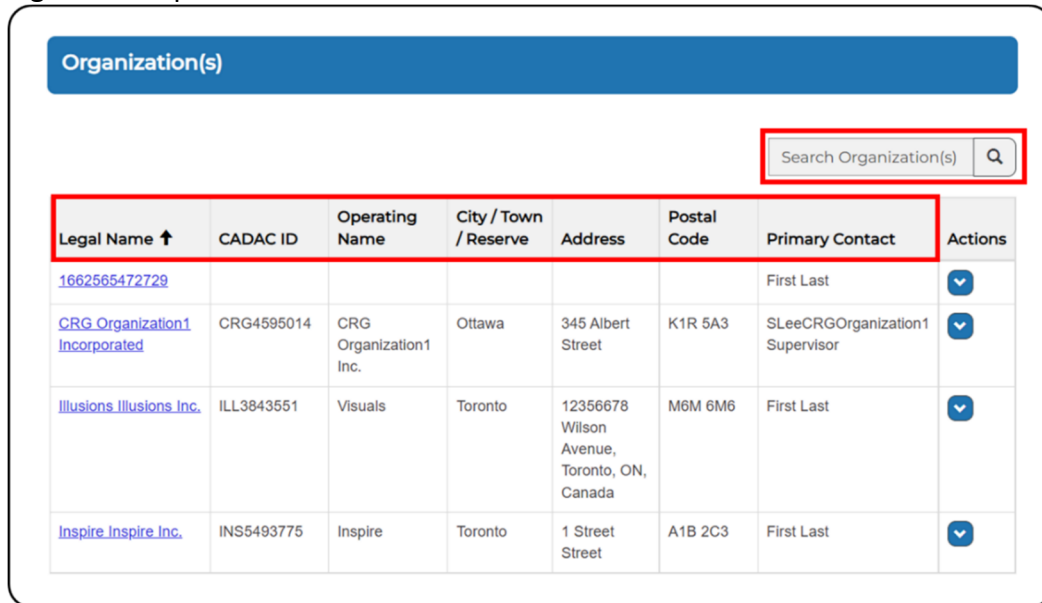
Figure 34 - User Profile Page

4. Your profile information has been updated. A notification "Your profile has been updated successfully." will appear.

Search and Sort Features

Users can search organizations using the search bar. Users can also sort lists by clicking on any of the column headers. For example, in the *Organization(s)* page (Figure 35), the listed organizations can be sorted alphabetically by their legal name. To sort it by CADAC ID, click on the **CADAC ID** header and the list can be sorted alphabetically by CADAC ID.

Figure 35 - Update User Profile

NAVIGATING IN CADAC AS AN ORGANIZATION

CADAC Menu

The *Organization(s)* page (Figure 36) provides users with the ability to enter, save, submit, and share the organization's financial and statistical information with arts funding agencies. For supervisors, this page allows users to manage the organization including its profile and users.

Note: Once an organization's profile has been created, the users will not have access to change the name of the organization or the fiscal year end. Some information is controlled by CADAC.

Figure 36 - Organization CADAC Menu
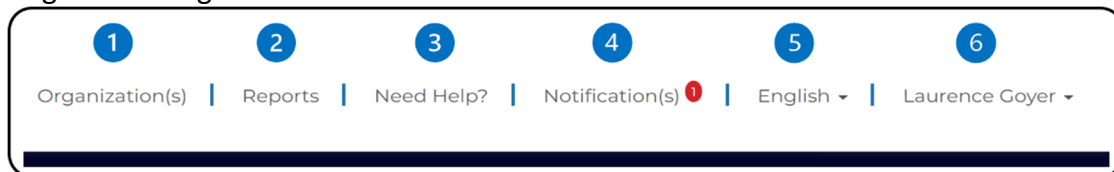
1   The *Organization(s)* page is used to view and manage the organization(s), manage its user(s), and to explore and manage financial and statistical information.

② The *Reports* page is used to view existing reports and CADAC methodology.

③ The *Need Help? p*age provides information on how to contact CADAC for support.

④ The *Notification(s)* page is used to read any notifications, for example, for a newly created user profile.

⑤ To change the language preference, click **French** or **English** and then choose your preferred language.

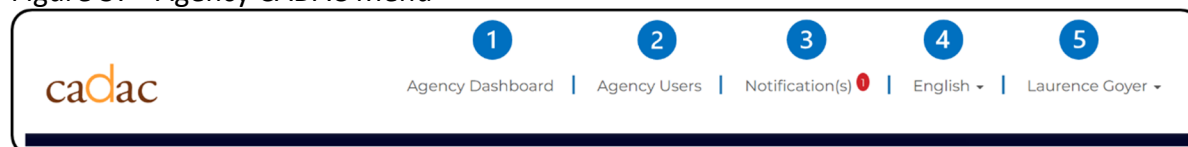⑥ To see the *Profile* page, click on your name and then choose **Profile**. The *Profile* page is used to manage a user's information and to change their own password.

NAVIGATING IN CADAC AS AN AGENCY

CADAC Menu

The Agency Portal (Figure 37) provides users with the ability to invite and view arts organizations, as well as view their financial and statistical information. It also allows users to manage the agency's users and program lists.

Figure 37 - Agency CADAC Menu

① The *Agency Dashboard* page is used to invite and view organization(s) profiles, view its user(s), and access their financial and statistical information.

② The *Agency User* page is used to invite, view, and manage agency users. The Agency dashboard can be accessed from this page.

③ The *Notification(s)* page is used to read your notifications, for example, when an arts organization responds to a reconciliation note.

④ To change the language preference, click **English** or **French** and then choose your preferred language.

⑤ To see the *Profile* page, click on your name and then choose **Profile**. The *Profile* page is used to manage a user's information and to change their own password.

1.4 SOME TECHNICAL INFORMATION

SYSTEM REQUIREMENTS

To use the CADAC webpage, you will need the following:
- A valid and unique email address.
- An internet connection.

Recommended Settings:
- Internet browser set to allow pop-ups.
- For best experience:
  - Monitor resolution should be set at 1024 x 768 pixels per inch.
  - Display settings should be set to 96 DPI to avoid formatting issues.

Recommended Browsers

| Chrome | Safari | Edge |

Operating Systems Supported

| PC | Mac |

ACCESSIBILITY

The CADAC system was built to respect the norms around accessibility and user experience and to be WCAG compliant. This means that it follows the *Web Content Accessibility Guidelines* to ensure all people with disabilities get proper access to the CADAC website.

To be WCAG compliant, we made sure that:
- Images contain a description
- Content can be magnified for easier reading

- Form-entry tasks have no time limit
- Navigation can be done without the use of a mouse (by using the "tab" button)
- The heading level structure is suitable for screen readers