Training Organization Dashboard User Guide

The Training Organization Dashboard Functions:

- Manage **Training Organization Dashboard** (Must be a training organization to access Dashboard) If you are not a training organization, see directions below to apply.
    - Manage Instructors
        - Accept instructor's requests to train for your organization
        - Add instructors to your training organization
    - Manage Trainings
        - Create New Events: Conferences, Series, Trainings, Community of Learners
        - Submit training for Ohio Approved Designation
        - Manage/schedule sessions and registrations
        - Accept/request trainings from other training organizations
        - Add trainings to a Call for Proposal

****Please be advised that the best web browsers to use for this process are Google Chrome or Mozilla Firefox. Using other browsers may delay the review process. ****

If you *are not* associated with a training organization and are an approved instructor, you can apply to be a Training Organization. This is necessary for you to create and submit training for approval. You can apply to be a training organization following the instructions below:

Apply to be a Training Organization:

1. Visit www.occrra.org to sign in to your profile, select **Applications** from the blue menu bar. Select **Training Org. Application.**

2. Select **Applicant:** within the drop down, choose Create New Organization. Continue, completing all fields.

3. Click **Next Step.** You will be automatically directed to the Training Organization Dashboard.

If you *are* associated with a training organization (and that organization already manages a Training Organization Dashboard), the administrator of that dashboard will need to grant you permissions for that dashboard. Please see the instructions below:

Training Organization Dashboard – Granting Access

The organization manager needs to grant permissions for staff/users to have access to the Training Org Dashboard.

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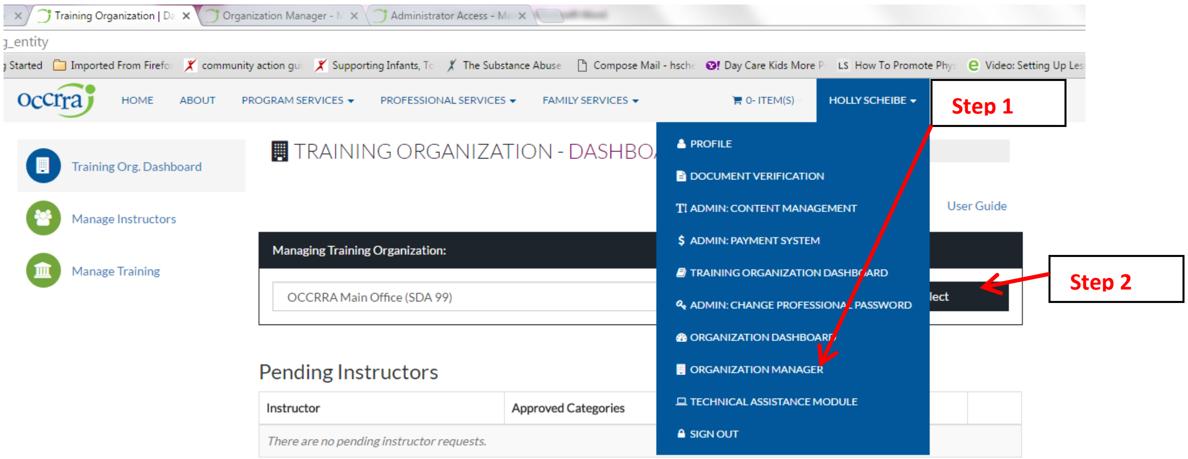
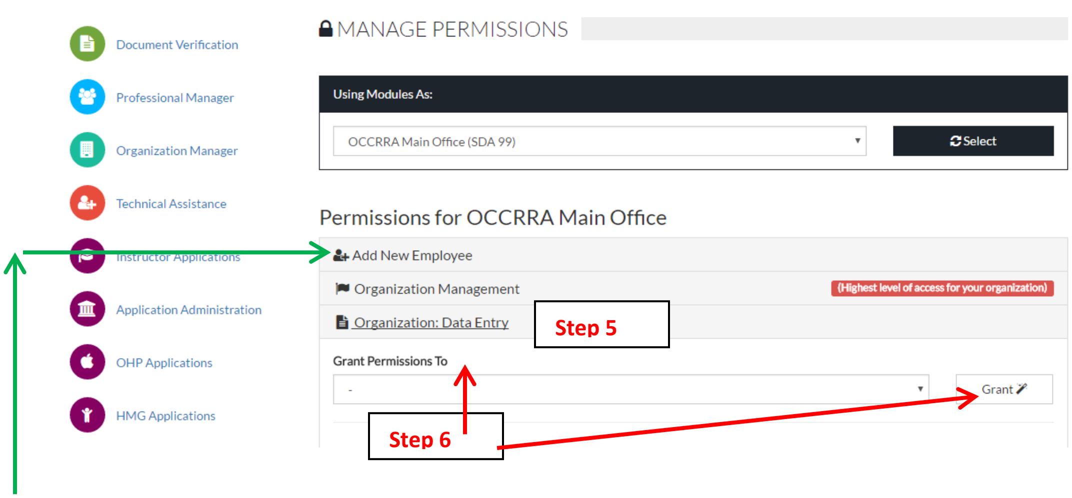
To grant access:

1. From the drop-down menu next to your name choose Organization Manager- Example below will look different based on user permissions.
2. Select agency in "Using Modules As"



3. Select "Organization Manager" icon on left menu
4. Select "Permissions" (orange box) for organization you are managing (if there is more than one)

5. Select "Organization: Data Entry"
6. Select staff from drop down that you wish to grant TA Module/Training Org Dashboard access. Click "Grant".



Note: If staff/user does not appear in "Grant Permission To" drop down, they will need to be added as a new employee. The employee should also update employment history in his/her profile.

Using the Training Organization Dashboard:

1. Visit www.occrra.org to sign in to your profile. Select **Training Organization Dashboard** from the drop-down menu below your name in the top navigation bar. **NOTE: This function is only enabled if you are a training organization or have been granted access to a training organization dashboard**.

2. Select the organization you want to manage. You only have access to organizations associated with your OPIN.

3. The **Training Organization Dashboard's** *home page* enables you to manage:
- Pending instructor requests
- Training requests from other organizations
- Upcoming trainings - To manage a specific training: Find ST#, then "Manage", Three tabs appear horizontally:
  - *Training information*: Training Details; Fees; Session Details; Event Status-Private/public; Activate training; Cancel; Finalize- will appear once training is set to Active
  - *Training Evaluations*
  - *Registrations*: Add registrations, email registrants, see list of registrants (To see entire list of registrants click on green "Locate Registrants")

4. The **Manage Instructors** tab enables you to add Ohio Approved instructors. Instructors who are not Ohio Approved will not be able to be added to an organization.

5. The **Manage Training** **(Events)** tab enables you to:
- Select which organization you want to manage
- Manage **Incoming Training Requests** from other training organizations
- Request trainings from other organizations from **Outgoing Training Request**
- **Create Event**:
  - Create New Conference, New Series, New Training, New Community of Learners
    - Submit for Ohio Approved Designation
  - Locate and manage a current training with AT# or Title
    - View Details
    - Schedule
    - Apply this training for a conference Call for Proposal
- **Manage Events:** To locate an event use the Filter, or enter the ST# or title, then click **Locate Event**. When filtering events – selecting *All Sessions* may require more time to pull all data. For faster functionality use filters.
  - **Training Information Tab**
    - Training information can be viewed/edited

    - **Attendance can be marked in Event Sessions Step 3 View Details**: Click the box next to participant name to record attendance.
    - **Material tab** includes sign-in sheet, roster, evaluation form, session summary, in-service form
    - Event is finalized in **Event Status, Final Step**
  - <u>**Training Evaluations Tab**:</u> Compile evaluation data
  - <u>**Registrations**</u>
    - Manually add registrant by OPIN or name
    - Send an email
    - Locate registrant by OPIN or name
    - View list of registrants by clicking **Locate Registrants**
    - View no-shows