



TrainingPartner™
LEARNING MANAGEMENT SYSTEM

Instructor

Help Guide

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Access Information

Accessing Training Partner on the Web

1) Open Internet Explorer by either of the ways below:

Double-click on the shortcut icon located on your desktop	OR	Click on the Internet Explorer icon located at the bottom left corner of your desktop
		

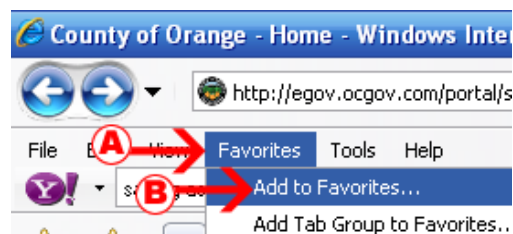
- 2) A) In the address field of the browser window, type <http://trainingpartner.ocgov.com> to access the Training Partner website
B) Click on the **GO / ARROW** button (or hit the ENTER key on your keyboard)



When Training Partner opens, you can add the website as a favorite or create a desktop shortcut. Either of the above will make it easier for you to access the Training Partner website in the future.

Add as Favorite

- A) Click on **Favorites**
B) Click on **Add to Favorites**



- C) Type **Training Partner Login**
D) Click on **Add**

Create Desktop Shortcut

- A) Click on **File**
B) Click on **Send**
C) Click on **Shortcut to Desktop**



The image shows two side-by-side screenshots. The left screenshot is a Windows 'Add a Favorite' dialog box. The 'Name' field contains 'Training Partner Login'. The 'Create in' dropdown is set to 'Favorites'. The 'Add' button is highlighted with a red box and labeled 'D'. A red circle 'C' is next to the instruction 'To access your favorites, visit the Favorites Center.' The right screenshot shows the 'File' menu of Internet Explorer. The 'Send' option is highlighted with a red box and labeled 'B'. The 'Shortcut to Desktop' option is also highlighted with a red box and labeled 'C'. Below the screenshots, the text reads: 'You'll see the following shortcut on your desktop.' followed by an icon of a folder named 'TP2005'.

Login to Training Partner

You are now at the login page and will be required to enter a User Name and Password.

If you are not at the login page, go to <http://trainingpartner.ocgov.com> or see the section above “**Access Training Partner on the Web**” for further details.

1) Enter your User Name



User Name - All users please read below

Your user name for Training Partner will always be your payroll name; the name you see on your paycheck or pay advice (minus any middle initial).

It needs to be entered in the format of **firstnamelastname** (with no middle initial or spaces in between). User names are NOT case sensitive and can be entered in either upper or lower case.

For example, someone by the name of Tony D. Smith may have his **Payroll Name** as Anthony Daniel Smith. For his **Training Partner Login ID**, he would then enter **anthonymsmith**.

Duplicate Names

It's possible that you may have the same first name and last name as someone else within the County who uses Training Partner. If this is the case, and you are unable to login, you will need to login using your first and last names AND your 6-digit employee #. Your employee # can be found on your paycheck or pay advice.

For example, if Tony Smith tried logging in as "anthonymsmith" and was unable to login, it's probably due to another person with the same first and last name already using Training Partner.

Anthony will then need to login in the format of "**firstname+lastname+employee #**"
For example, **anthonymsmith012345**.

If you still are experiencing issues with logging in, please contact your agency's Training Coordinator, who will then notify the Training Partner Administrator.

Hyphenated Last Names

For those of you that have a hyphenated last name, please try to login with your username in the format of "**firstname+hyphenatedlastname**." For example, if your full name was **Mary Jones-Taylor**, you would then login with a username of **maryjones-taylor**.

2) Enter your Password



Initial Password – For all new users

Your initial password = **password** (lower case)

Once logged in successfully, you will be able to change your password.
See section below named "Change Password"

3) Click **OK**

Training Partner

Catalogs

Welcome to Your Training Partner

Please enter your user name and password

If you have forgotten your password we may [e-mail](#) it to you.

Login

User Name: johndoe 1

Password: ***** 2

OK 3

Add /Change Email Address

Training Partner automatically sends class enrollment confirmations and other notifications via Email, provided you have entered your Email Address into Training Partner. After logging in successfully for the first time, it is necessary to enter your Email address so that Training Partner knows where to send Email notifications. If your Email address should change (because of a name change, for example), you need to change your Email address by following the same procedure.

- 1) Upon logging into Training Partner, click on the **Learner** menu bar to expand this section.



- 2) Click on **Change Email**



- 3) A) Enter your **full email address** (e.g., john.doe@rov.ocgov.com) in the email field
B) Click **OK**



Address 1 field

Do not enter anything in the Address 1 field. Leave it blank.



Change Password

Your initial default password to login to Training Partner is **password**.



It is imperative to change your default password

To ensure your privacy, it is highly recommended that you change your password upon logging in successfully for the first time.

Training Partner passwords

- are case sensitive
- can be any combination of letters and/or numbers
- can be as short as two characters
- never expire

1) Upon logging into Training Partner, click on the **Learner** menu bar to expand this section.



2) Click on **Change Password**



- 3) A) Enter your **Old** password
B) Enter your **New** password
C) **Re-enter** your new password
D) Click **OK**

Forgotten Password

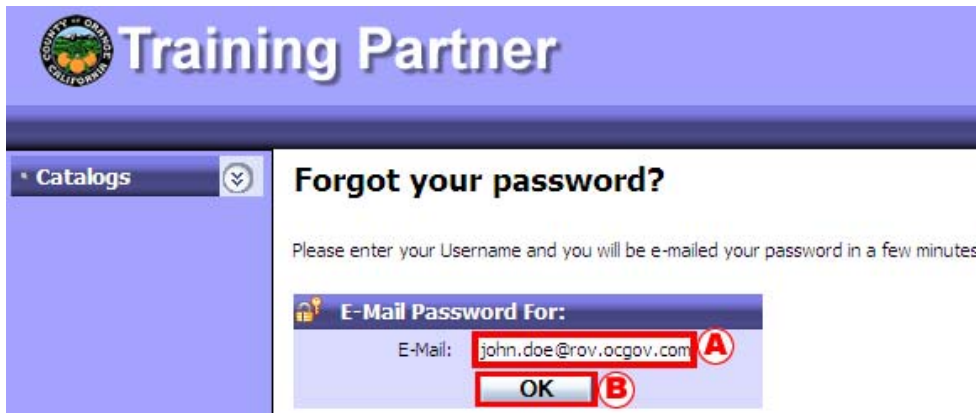
If you forget your password, Training Partner can send you a reminder via email, provided that you have entered your email address on the **Add/Change Email Address** screen (see section above).

To request a password reminder, simply:

- 1) Go to the Training Partner login page at <http://trainingpartner.ocgov.com>
- 2) Click on the **email** link



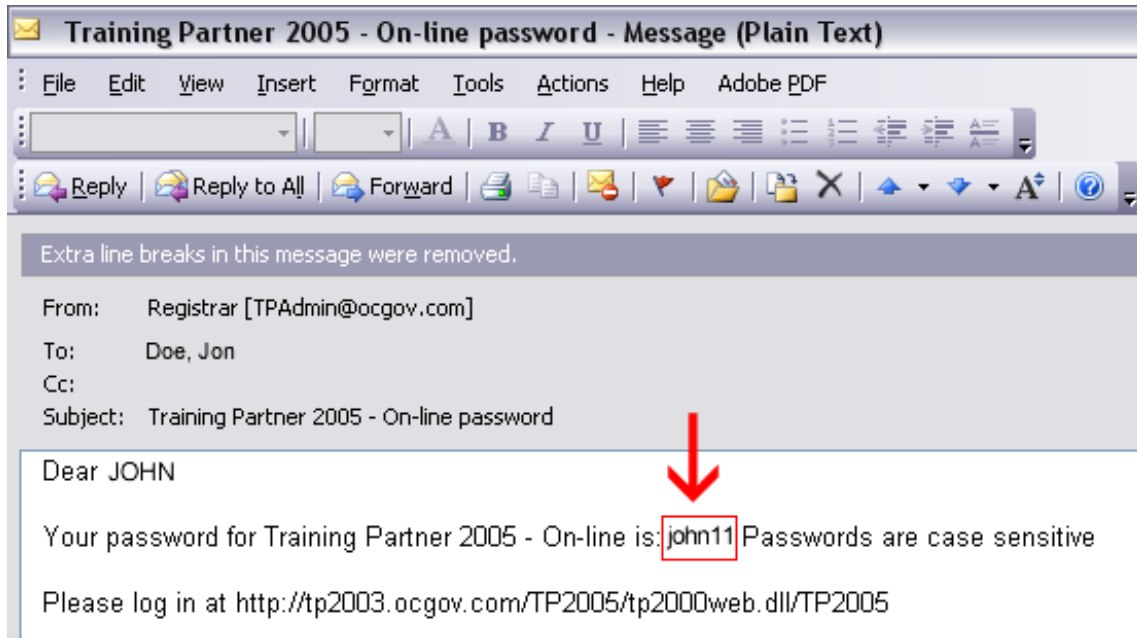
- 3) A) Enter your **full email address** (e.g., john.doe@rov.ocgov.com) in the email field
- B) Click **OK**



- 4) Within a few minutes, you will receive an email address from **Registrar**



5) Within the email, you will see your password



Change User Name

If you have submitted a name change for County Payroll, your new name will appear at the top of the Training Partner pages shortly after the name change has been processed by payroll. This change will not, however, affect your original User Name that you use to sign on to Training Partner.

For example, Ann Jones' user name for Training Partner is **annjones**. If Ann Jones gets married and her name is changed to Ann Smith, she can submit a name change request to County Payroll. Once the request has been processed, she will continue to use **annjones** for logging in to Training Partner.



Instructor Tasks

Instructor Role

All Trainers are assigned this on-line role, which gives them the ability to review their classes, attendance, run reports, etc.



Enrolling Managed Learners not permitted with Instructor role

With the Instructor role, you have all the abilities of the Supervisor role as well. However, you WILL NOT be able to enroll your managed learners in any classes. This functionality is not currently supported by the system. If you are a Supervisor with the Instructor role, your managed learners will need to enroll in classes themselves.

My Classes Screen

- 1) Upon logging into Training Partner, you will see the “My Classes” default screen which displays classes in which you will be training in the formats of Today, Current and Upcoming:

Today
Classes you have today

Item	Type	Times
General Safety	Class Session	9:00 AM-5:00 PM

Current Classes
Classes you are in the middle of, like a multiple day class

Course	Next Session
--------	--------------

Upcoming
Classes scheduled for future dates

Event	Begins
PowerPoint 101	12/8/2008

Actions
Add Appointment

- 2) In the upcoming section, click on one of the class titles to see further details for this particular class

Upcoming	
Event	Begins
 PowerPoint 101	12/8/2008



3) The **Schedule screen** will now display with the following:

- A) Facility details
- B) Equipment details (Not used at this time)
- C) Instructors details



Training Partner

INSTRUCTOR, IVAN

Catalogs

Search:

- Course Catalog
- Program Catalog
- Job Role Catalog
- Skill Catalog

Instructor



- My Classes
- Schedule

Learner

- My Calendar
- My Training
- View Reports
- Transcript
- Programs
- Job Roles
- Skills
- General



PowerPoint 101

 Schedule
 Enrollments
 Units
 Gradebook
 Attendance
 Summary Attendance

General

Course: PowerPoint 101

Code: OC245

Status: Scheduled


Location: 12 Civic Center Plaza, Santa Ana

Organization:

Schedule

Date	Times	Facility	A
 12/8/2008	8:00 AM-10:00 AM	Room A	

Date	Times	Equipment	B

Date	Times	Instructor	C
 12/8/2008	8:00 AM-10:00 AM	Instructor, Ivan	

4) Click on **Enrollments**

The screenshot shows the 'Training Partner' interface for instructor IVAN. The 'Enrollments' tab is highlighted with a red box. The 'General' section displays course information for 'PowerPoint 101' (Code: OC245, Status: Scheduled, Location: 12 Civic Center Plaza, Santa Ana).

5) The **Enrollments** screen will now display with the following:

- A) Cancelled learners
- B) Enrolled learners



Email Link

The email address next to each learner can be clicked on to send an email to that person.

You can also click on the “Email this Group” link to email everyone.

The screenshot shows the 'Enrollments' screen for 'PowerPoint 101'. The 'Enrollments' tab is highlighted in red. The 'Enrollments' section is divided into 'Cancelled' and 'Enrolled' categories. The 'Enrolled' section is highlighted with a red box and contains a table of learners with their names and email addresses. A red circle 'A' points to the 'Cancel' link, and a red circle 'B' points to the 'Enrolled' section.

Enrollments	
Cancelled Email this Group	
SMITH, MIKE	mike.smith@ocgov.com
Enrolled Email this Group	
JENSEN, JEN	jen.jenson@ocgov.com
SMITH, SAM	sam.smith@ocgov.com
CONNERS, CATHY	cathy.conners@ocgov.com

- 6) The **Units** button when clicked, will display activities that must be completed by each learner. Units might consist of exams, homework assignments, class evaluations or online trainings.



The screenshot shows the Training Partner interface for an instructor named Ivan. The main header is "Training Partner" with the County of Orange logo. Below the header, it says "INSTRUCTOR, IVAN". On the left, there are navigation tabs for "Catalogs" and "Instructor". The "Catalogs" tab is active, showing a search bar and a list of catalog types: Course Catalog, Program Catalog, Job Role Catalog, and Skill Catalog. The main content area is titled "PowerPoint 101" and features a navigation bar with icons for Schedule, Enrollments, Units, Gradebook, Attendance, and Summary Attendance. The "Units" button is highlighted with a red box. Below the navigation bar, there is a "General" section with the following details: Course: PowerPoint 101, Code: OC245, Status: Scheduled, Location: 12 Civic Center Plaza, Santa Ana, and Organization: (blank).

- 7) The **Gradebook** button when clicked, will display grades entered by the Instructor when a class has been created and designed to include tests and exams



The screenshot shows the Training Partner interface for an instructor named Ivan. The main header is "Training Partner" with the County of Orange logo. Below the header, it says "INSTRUCTOR, IVAN". On the left, there are navigation tabs for "Catalogs" and "Instructor". The "Catalogs" tab is active, showing a search bar and a list of catalog types: Course Catalog, Program Catalog, Job Role Catalog, and Skill Catalog. The main content area is titled "PowerPoint 101" and features a navigation bar with icons for Schedule, Enrollments, Units, Gradebook, Attendance, and Summary Attendance. The "Gradebook" button is highlighted with a red box. Below the navigation bar, there is a "General" section with the following details: Course: PowerPoint 101, Code: OC245, Status: Scheduled, Location: 12 Civic Center Plaza, Santa Ana, and Organization: (blank).

Attendance




Attendance Page

The "Attendance" page is used **ONLY** for *multiple day* training classes. This will help you keep track of attendance records internally for each of the days of training. This page **DOES NOT** change the attendance status recorded in Training Partner. To record the attendance status, you will need to go to the Summary Attendance section below.

- 1) Upon logging into Training Partner, as an Instructor you will see the "My Classes" default screen that displays upcoming classes in which you are an Instructor for.

2) Click on one of the class titles to get to the attendance link

Upcoming	
Event	Begins
 PowerPoint 101	12/8/2008



Alternative Method and to View Classes from the Past

You can also search for and click on the class title by clicking on the Schedule link on the left navigation under the "Instructor" menu.

3) Click on **Attendance**



The screenshot shows the 'Training Partner' interface for an instructor named Ivan. The main header is 'Training Partner' with the County of Orange logo. Below the header, it says 'INSTRUCTOR, IVAN'. On the left, there are two main menu sections: 'Catalogs' and 'Instructor'. Under 'Catalogs', there is a search box and a list of links: Course Catalog, Program Catalog, Job Role Catalog, and Skill Catalog. Under 'Instructor', there is a search box. In the center, there is a section for 'PowerPoint 101' with a person icon. Below this, there are several navigation links: Schedule, Enrollments, Units, Gradebook, Attendance (highlighted with a red box), and Summary Attendance. Below the navigation links, there is a 'General' section with the following details: Course: PowerPoint 101, Code: OC245, Status: Scheduled, Location: 12 Civic Center Plaza, Santa Ana, and Organization: (blank).

4) The **Attendance screen** will allow you to mark each student with either an **"Absent"** or **"Incomplete"** status for each day of the multiple day class

- A) If a student was absent or did not complete the course, select either one of these status' with a checkbox next to his/her name
- B) Click **OK**



Training Partner

INSTRUCTOR, IVAN

Catalogs

Search:

- Course Catalog
- Program Catalog
- Job Role Catalog
- Skill Catalog

Instructor

- My Classes
- Schedule

Learner

- My Calendar
- My Training
- View Reports
- Transcript
- Programs
- Job Roles
- Skills
- General
- Change Email

PowerPoint 101

- Schedule
- Enrollments
- Units
- Gradebook
- Attendance
- Summary Attendance

Attendance

Day 1

Day 2

Use the checkboxes to indicate when student is absent or incomplete and click Ok.

Name	12/8/2008	12/9/2008
SMITH, BOB	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete
NICKSON, NINA	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete
JONES, JOAN	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete
TOMSON, TOM	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete

5) The next screen will display “**Attendance Updated**” with the status’ of the individuals you have marked

Training Partner
INSTRUCTOR, IVAN

PowerPoint 101

Schedule | Enrollments | Units

Attendance

Use the checkboxes to indicate when a student is

Attendance Updated ←

Name	12/8/2008	12/9/2008
SMITH, BOB	<input type="checkbox"/> Absent <input checked="" type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete
NICKSON, NINA	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete
JONES, JOAN	<input checked="" type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input checked="" type="checkbox"/> Absent <input type="checkbox"/> Incomplete
TOMSON, TOM	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete	<input type="checkbox"/> Absent <input type="checkbox"/> Incomplete

OK

6) After the last day of the training session, you will need to **complete the Summary Attendance page**. (See section below)

Summary Attendance



Summary Attendance Status

The “Summary Attendance” page is used for ALL classes to record attendance status. It’s highly recommended for Instructors or their designated administrative staff to record attendance status by the next business day following the completion of a single-day or multi-day class.

Default Attendance Status is “Complete”

In step 4A below, you’ll notice the three options in the drop-down menu are: Complete, Incomplete, & Absent. By default, the status is “Complete”

- 1) Upon logging into Training Partner, you will see the “My Classes” default screen which displays classes in which you
- 2) Click on one of the class titles to get to the summary attendance link



Alternative Method

You can also search for and click on the class title by clicking on the Schedule link on the left navigation under the “Instructor” menu.

Upcoming	
Event	Begins
PowerPoint 101	12/8/2008

- 3) Click on **Summary Attendance**

The screenshot shows the Training Partner interface for an instructor named Ivan. The main header displays the Training Partner logo and the instructor's name. Below the header, there is a navigation menu with options like Catalogs, Instructor, Schedule, Enrollments, Units, Gradebook, Attendance, and Summary Attendance. The Summary Attendance link is highlighted with a red box. The main content area shows details for the course PowerPoint 101, including its code (OC245), status (Scheduled), location (12 Civic Center Plaza, Santa Ana), and organization.

- 4) The **Summary Attendance screen** will allow you to mark each student with either an “**Incomplete**” or “**Absent**” status, or keep the default status of “**Complete**”
 - A) Select the attendance status for each student
 - B) Click **OK**

Training Partner

INSTRUCTOR, IVAN

PowerPoint 101

Schedule | Enrollments | Units | Gradebook | Attendance | Summary Attendance

Summary Attendance

Use the drop-down boxes to indicate the student's summary attendance for the class and click OK.

Name	Status
SMITH, TOM	Complete

OK

Complete
Incomplete
Absent

View Reports

Below are the available types of reports that an Instructor can run.

To run reports:

- 1) Login to Training Partner, and click the **Learner** menu bar to expand this section

Training Partner

INSTRUCTOR, IVAN

Catalogs

Learner

Review

2) Click on **View Reports**



3) Click on **OC Online Reports** to view the list of reports

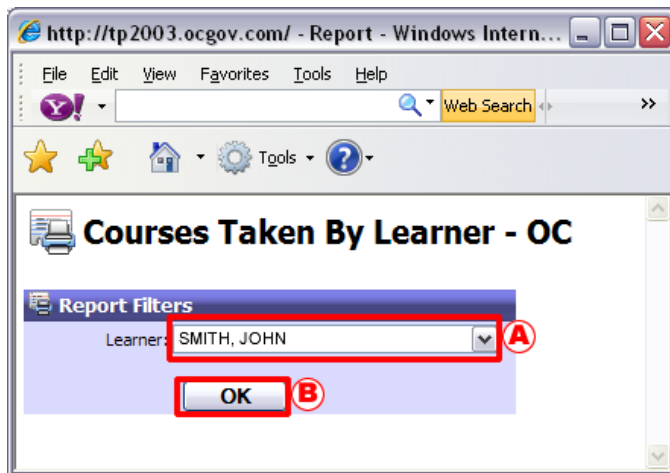


4) Click on any one of the available reports



5) In the example below, we clicked on the report “**Courses Taken By Learner**” and in the pop-up window:

- A) Select your **Learner**
- B) Click **OK**



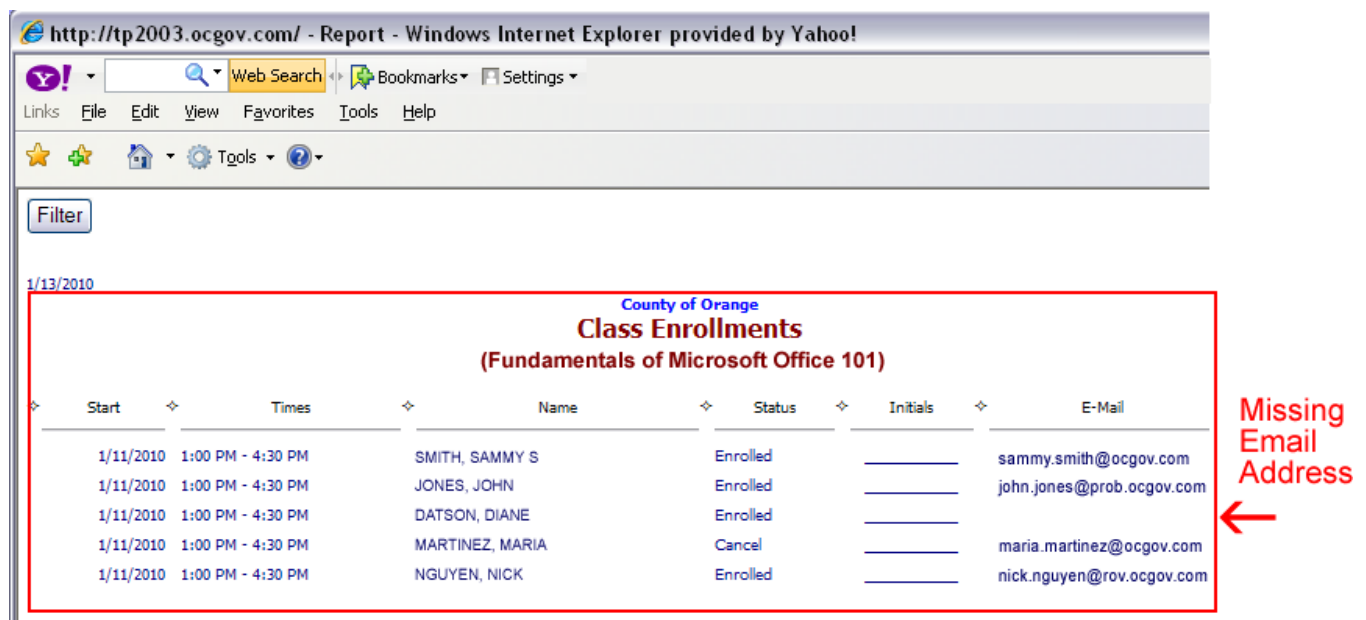
6) The report will display the Courses taken by the Learner

Class Sign-in-Sheet

A class sign-in-sheet can be printed and/or downloaded by running any one of the class sign-in-sheet reports in which your class is listed under (see step 4 in the View Reports section above).

Notice in the example below, the email address for the Learner 'Diane Datson' is missing. The system does not automatically populate one's email address and therefore each Learner must input his/her own County email address into the system so that it can automatically send class enrollment confirmations and other notifications via email, provided the Learner has entered their email address into Training Partner.

As a courtesy (during the training class or via email/phone) you can let the Learner know he/she needs to input their email address into the system. For detailed instructions, you can direct them to the section named **"Add/Change Email Address"** in any of the 3 help guides that they may already have or they can download/print these from the Help Site at <http://www.ocgov.com/hr/trainingpartner>.



1/13/2010

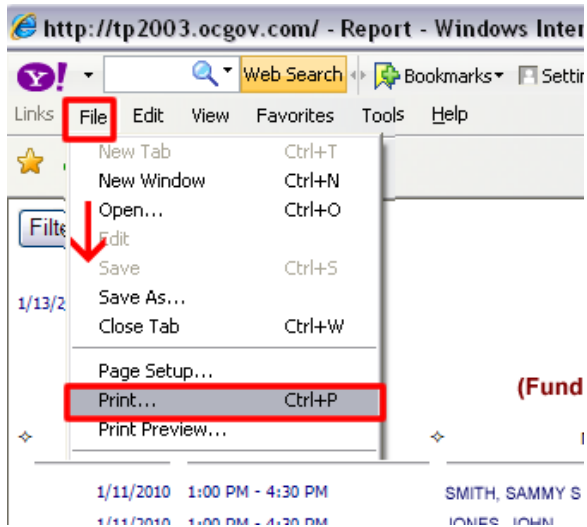
County of Orange
Class Enrollments
(Fundamentals of Microsoft Office 101)

Start	Times	Name	Status	Initials	E-Mail
1/11/2010	1:00 PM - 4:30 PM	SMITH, SAMMY S	Enrolled	_____	sammy.smith@ocgov.com
1/11/2010	1:00 PM - 4:30 PM	JONES, JOHN	Enrolled	_____	john.jones@prob.ocgov.com
1/11/2010	1:00 PM - 4:30 PM	DATSON, DIANE	Enrolled	_____	
1/11/2010	1:00 PM - 4:30 PM	MARTINEZ, MARIA	Cancel	_____	maria.martinez@ocgov.com
1/11/2010	1:00 PM - 4:30 PM	NGUYEN, NICK	Enrolled	_____	nick.nguyen@rov.ocgov.com

Missing Email Address

To PRINT report:

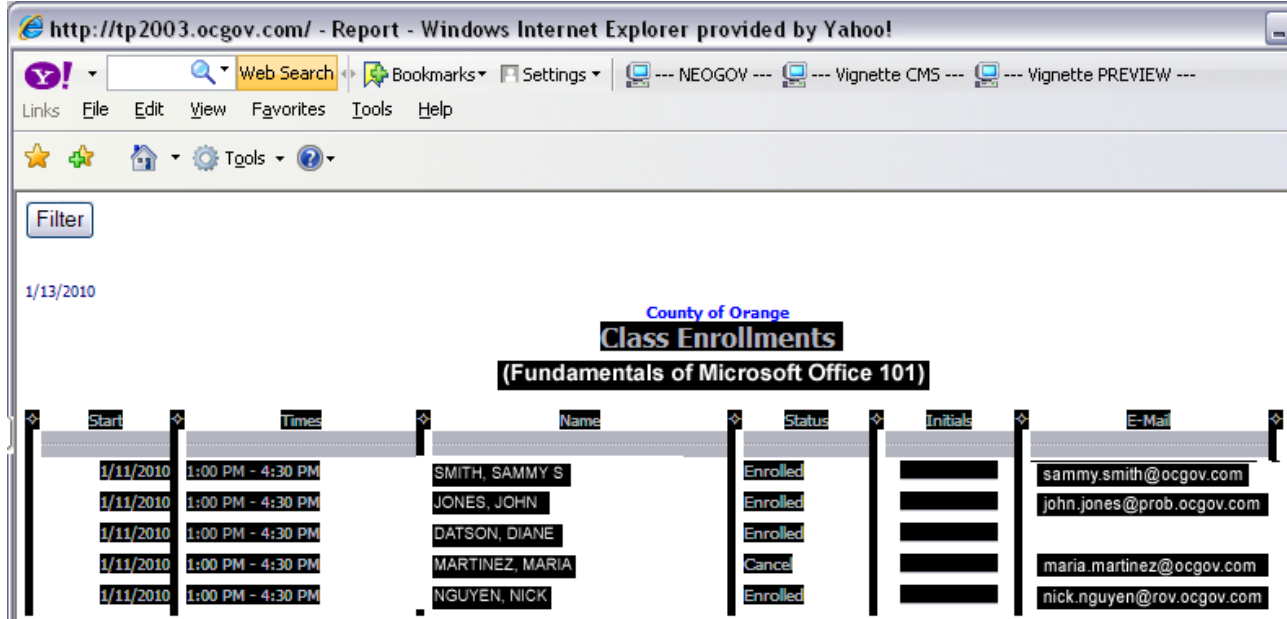
- 1) Run your report
- 2) Click on **File > Print**



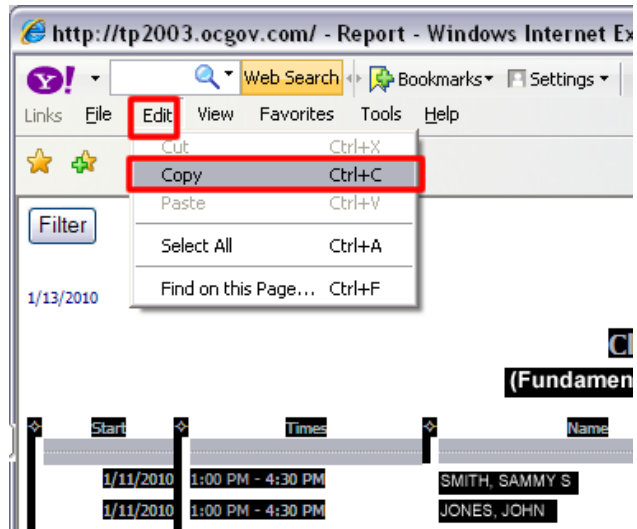
To EXPORT report:

Based on which report you run, you may want to export into Microsoft EXCEL and format/filter the data based on your needs.

- 1) Run your report
- 2) With your mouse, highlight all the data on the report (from top to bottom)



- 3) While having the data highlighted, click on **Edit > Copy** (from the top menu bar of the browser)



- 4) Open Microsoft EXCEL
- 5) Create a new blank workbook
- 6) Paste your copied data into this workbook
- 7) Format and/or filter the data to your needs

Glossary

Class

A class refers to a specific data and time that a Course is scheduled to occur. A class will always have at least one (1) session, but can have multiple sessions. Normally there will be one (1) session for each day of a class, however, in certain cases you can have multiple sessions on the same day. For example, a class might have a morning session from 9:00am to 12:00am and a night lab from 7:00pm to 9:00pm both on the same day.

Class Waitlist

A list maintained within Training Partner that contains the names of learners who would like to attend a full class should a seat become available due to cancellation by another learner.

Course

A course is a topic or subject that is being offered through training. A typical course might be "Introduction to Microsoft Excel."

Course Waitlist

A tool that Instructors and Training Partner Administrators use to determine if a class needs to be scheduled for a particular course. Clicking a Course Waitlist link will add your name to a Course Waitlist, but will automatically enroll in a class once it is scheduled. When you add your name to a Course Waitlist, the Course appears on your "My Training" screen under Waitlisted Courses.

Instructor

All Trainers are assigned this on-line role, which gives them the ability to review their classes, attendance, run reports, etc.

Learner

A learner is basically an employee (also referred to as student) who enrolls in a class.

Managed Learner

Any employee who is under your direct supervision. In Training Partner, employees (students) are frequently referred to as Learners; however, the terms 'learner', 'student', and 'employee' are often used interchangeably.

Non-Cataloged Learning Event

A non-cataloged learning event can be any training or workshop that does not appear in Training Partner Course Catalog and that is not scheduled through Training Partner. These events may be from other county departments, technical schools, local Community Colleges, local agencies/organizations, or other non-traditional sources. For further details, see section "Add a Non-Cataloged Learning Event"

On-line Role

The role you have been assigned as a user of Training Partner. Your on-line role determines which menu options are available to you. For example, if your on-line role is 'Supervisor', you have an additional Review Menu that is not available to regular learners. Staff with an on-line role of 'Instructor' have additional menu options that are not available to supervisors or learners.

Payroll Name

The name that appears on your paycheck or pay advice, minus any middle initial.

Supervisor

All Managers and Supervisors are assigned this on-line role, which gives them the ability to view information for employees who are under their direct supervision. This includes viewing employee's training history, approving a non-cataloged event, view enrollments and cancellations, etc.

Training Partner

A Learning Management System (LMS) that provides a gateway to training and staff development opportunities for the County of Orange employees.