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## GLOSSARY

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Access Information

Accessing Training Partner on the Web

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

<table>
<thead>
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<th>Double-click on the shortcut icon located on your desktop</th>
<th>OR</th>
<th>Click on the Internet Explorer icon located at the bottom left corner of your desktop</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Internet Explorer" /></td>
<td></td>
<td><img src="image2.png" alt="Start Button" /></td>
</tr>
</tbody>
</table>

2) A) In the address field of the browser window, type [http://trainingpartner.ocgov.com](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)

![Image](image3.png)

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.

<table>
<thead>
<tr>
<th>Add as Favorite</th>
<th>Create Desktop Shortcut</th>
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<tr>
<td>A) Click on <strong>Favorites</strong></td>
<td>A) Click on <strong>File</strong></td>
</tr>
<tr>
<td>B) Click on <strong>Add to Favorites</strong></td>
<td>B) Click on <strong>Send</strong></td>
</tr>
<tr>
<td>C) Type <strong>Training Partner Login</strong></td>
<td>C) Click on <strong>Shortcut to Desktop</strong></td>
</tr>
<tr>
<td>D) Click on <strong>Add</strong></td>
<td></td>
</tr>
</tbody>
</table>
You'll see the following shortcut on your desktop.

**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](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 anthonysmith.
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
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**

**NOTE**  
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 by 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**

![Image of Training Partner interface with highlighted Change Password button]

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

![Image of Change Password interface with fields for old, new, and confirmation passwords]

**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](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

From: Registrar [TPAdmin@ocgov.com]
To: Doe, Jon
Cc: 
Subject: Training Partner 2005 - On-line password

Dear JOHN

Your password for Training Partner 2005 - On-line is: John11 Passwords are case sensitive


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.
Supervisor Tasks

Supervisor Role

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

Select Your Managed Learners

A Managed Learner is 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.

DO NOT Forget to Select your Employees

In order to review, monitor, approve, and receive notifications regarding training of staff whom you supervise, you must first select your employees’ names from a list of Unassigned Learners. (See Instructions below)

The Training Partner database is populated with the names of all County employees and their Org Codes through weekly downloads from CAPS. It takes approximately one week from their start date for a new employee’s name to appear in the Training Partner database. Once their name and Org code is added to the database, it will appear in the list of Unassigned Learners and is available for you to select.

1) Upon logging into Training Partner, click on Review menu bar to expand this section
Review Menu Bar Not Displaying?
If you are a Supervisor, but you do not see the Review Menu Bar on the left side of the screen, your on-line role has not been set to Supervisor. Please contact your agency’s Training Coordinator to have them notify the Training Partner Administrator to have your on-line role changed to Supervisor.

2) Click on Learners

3) Click on Find Unassigned Learner
4) Employees in your Org NOT assigned to a Supervisor are listed on the results screen of “Learners without a Supervisor

A) Click the checkbox next to the name (or names) of any staff you supervise
B) Click the OK button, located at the bottom of the list

5) Your selected staff will appear on the “Learners Managed” screen
Managed Learners Outside Your Org

If you supervise staff who are in a different Org than you, their name(s) will not appear on the results screen of “Learners without a Supervisor” for your Org.

1) To add staff to your Learners Managed list, click on the **Find Unassigned Learner** button

2) In the Find Learners Form:

   A) Enter **Last Name, First Name** for the staff you are searching for

   **First Name Not Required**
   A first name is not required, however, including a first name may help with narrowing down your search.

   **Payroll Name**
   Remember to use their payroll name

   B) Click the **checkbox** to search for all organizations
   C) Click **OK**
3) The name you entered should appear on the results screen of “Learners without a Supervisor”

   A) Click the checkbox next to the name (or names) of any staff you supervise
   B) Click the OK button, located at the bottom of the list

4) Your selected staff will appear on the “Learners Managed” screen
Unassign a Managed Learner

When an employee is no longer under your supervision, un-assigning them returns their name to the “Learners without a Supervisor” list.

| **NOTE** |
| Transferred Employee |
| If the employee has transferred to another Org (Agency), their new Supervisor will not be able to select them as a “Managed Learner” until they have been unassigned by you. |

To un-assign an employee who is no longer under your supervision:

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

2) Click on **Learners**
3) Click **Un-assign** to the right of the employee’s name you are un-assigning

![Image of Training Partner interface showing Learners Managed section with un-assignment action]

4) Notice the name of the employee you unassigned above, is removed from your “Learners Managed” list. The name is returned back to the “Learners without a Supervisor List”

![Image of Training Partner interface showing Learners Managed section with name removed]

**View a Managed Learner’s Training History**

Supervisors can view their employee’s training history, including any upcoming classes they are scheduled to attend as well as classes they have already taken.

**To un-assign an employee who is no longer under your supervision:**

1) Login to Training Partner, and click the **Review** menu bar to expand this section
2) Click on **Learners**

3) In the Learner’s Managed list, click the **name of the employee** whose training history you would like to review
4) To view the employee’s upcoming classes, click on Training

5) Notice the upcoming classes listed for this employee
6) To view the employee’s training history, click on Transcript

7) Notice the Training History is listed for this employee
Add/Change a Managed Learner’s Email Address

Most County of Orange employees have an Email address; however, some do not. Employees who do not have an Email address typically are in work assignments that neither require nor provide frequent access to a computer. If you supervise employees who do not have regular access to a computer, or have limited computer skills, you may wish to receive Email from Training Partner on their behalf.

To add/change email address of your employee:

1) Login to Training Partner, and click the Review menu bar to expand this section

2) Click on Learners
3) Click on the name of the employee whose Email address you would like to add/change

4) Click on the Change Email link beneath the employee’s name

5) A) Enter email address or change the existing one

   **NOTE**

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

   **Email Address Format**
   Email address should be in full format (e.g., john.doe@rov.ocgov.com)

   B) Click OK
Change a Managed Learner's Password

If you supervise employees who do not have regular access to a computer, or have limited computer skills, you may wish to change their Training Partner password for them other than the default password of password.

To change password of your employee:

1) Login to Training Partner, and click the Review menu bar to expand this section
2) Click on **Learners**

3) Click on the **name of the employee** whose password you would like to add/change

4) Click on the **Change Password** link beneath the employee’s name

5) A) Enter the **Old** password

   **NOTE**

   **Forgot Password**
   If you do not know the old password of your employee, please refer to the Forgot Password section in this guide.

   B) Enter the **New** password
   C) **Re-enter** the new password
   D) Click **OK**
6) You may want to note the password somewhere and/or let your employee know what it is

**Enroll Managed Learners in a Class**

As mentioned above, some learners may have limited access to a computer or limited computer skills that prevent them from enrolling in training classes. A supervisor has the ability to enroll one or multiple managed learners under their supervision in training classes.

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

2) Click on **Course Catalog**
3) You can search for a class by either of the two (2) methods below:

**Method 1:** Search by Title/Code field  
(recommended search method)

**Method 2:** Search by Folder

![Course Catalog]

---

**Search Methods – Refer to Learner Guide**

For further details, refer to either of the following two sections in the Learner Help Guide:

- *Search for Course by Title/Code*

- OR

- *Search for Course By Folder*

---

4) Once you have found the desired class:

A) Check to make sure the # of seats remaining will accommodate the number of employees you plan to enroll

B) Click the Course Name to view additional information
5) A) Check to make sure class date(s), time(s), location, etc will work for your employees  
B) Click on **Enroll My Learners**
6) On the Enroll My Learners screen:

   A) Click in the **Enroll checkbox** next to the name(s) of each managed learner you would like to enroll
   
   B) Click **OK**

7) Both you and the enrolled learners will receive a confirmation email regarding their enrollment in the class, provided they have entered their email addresses in Training Partner on the **Add/Change Email Address** screen (see section above).

   The email will be from Online, as displayed below:

   **NOTE**: **DO NOT** reply to this email from Online as it is an unmonitored email box.
Opening the email will display the following detailed information:

![Email Confirmation](image)

Training Partner does not send automated class reminders. Therefore it is highly recommended that you enter the class date and time in your Outlook Calendar with at least a two (2) day reminder of the class.

**Additional Enrollment Details**

Please see the “Class Information” section in the Learner’s Help Guide for additional enrollment details such as: If Class is Full, If Class is Not Scheduled, Cancelling Enrollment, or Repeating a class.

**Approve or Delete a Non-Cataloged Learning Event**

Learners are encouraged to enter a Non-Cataloged Learning Event into Training Partner to ensure that relevant business-related training is kept track of in their “Training History.” A non-cataloged learning event can be any
training, conference or workshops, which have not been tracked by Training Partner. These events may be from other county departments, non-traditional sources or outside agencies. Please see the “Add a Non-Cataloged Learner Event” section in the Learner’s Help Guide for additional details.

<table>
<thead>
<tr>
<th>Supervisor Confirmation (Approval)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-cataloged learning events do not become part of a learners’ permanent transcript until a supervisor has confirmed (approved) the event. Credible evidence of a learner’s attendance at a non-cataloged event should be presented prior to the Supervisor confirming the event.</td>
</tr>
<tr>
<td>Some examples of credible evidence of attendance are:</td>
</tr>
<tr>
<td>- Certificate of Completion</td>
</tr>
<tr>
<td>- Training Handbooks</td>
</tr>
<tr>
<td>- Registrations Receipts</td>
</tr>
<tr>
<td>- Grade Transcript</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supervisor Deletion (Disapproval)</th>
</tr>
</thead>
<tbody>
<tr>
<td>If a non-cataloged learning event is entered by a learner that the Supervisor deems inappropriate or non-work related, the Supervisor may disapprove the event by selecting a status of ‘delete’. When this is done, the non-cataloged learning event is deleted from the learner’s transcript.</td>
</tr>
</tbody>
</table>

**To approve or disapprove (confirm or delete) a non-cataloged learning event:**

1) Login to Training Partner, and click the **Review** menu bar to expand this section
2) Click on **Non-Cataloged Events**

3) The **Review My Learners Non-Cataloged Events** screen is displayed

4) A) Click the **drop-down menu** list in the Status field for the selected learner and select either **Confirmed** or **Delete**
   
   B) Click **OK**
Convert a Non-Cataloged Learning Event to an Existing One

When an equivalency can be established between a learner’s non-cataloged learning event and an existing course already available through Training Partner, it is possible to convert the non-cataloged learning event to an existing course.

For example, learner Jane Smith attended a class in First Aid and CPR sponsored through her local YMCA in 2007. The topics covered in the class closely match the topics covered in the Medic First Aid CPR and AED Training 2007 offered by RDMD Human Resources. Upon completion of the YMCA-sponsored course, Jane was issued an official certificate from the Red Cross identical to one she would have received had she taken the HR-sponsored class. Jane’s job assignment requires that she holds a current Red Cross certificate with regular periodic updates and Human Resources has determined that her YMCA-sponsored training satisfies the requirement. Jane’s Supervisor can, therefore, convert Jane’s non-cataloged learning event (the YMCA training) so that her Training Partner transcript reflects that he has satisfied RDMD’s requirement for Red Cross certification through a course equivalency.

To convert a non-cataloged learning event to an existing course:

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

2) Click on **Non-Cataloged Events**
3) The **Review My Learners Non-Cataloged Events** screen is displayed

4) Click the **Course icon** to open the Course Selection window

5) In the pop-up window, click on one of the appropriate folders to find and select an equivalent course
6) **A)** Click on the **radio button** next to the equivalent course from the course list
   In this example, we determined that PowerPoint 101 would be equivalent to PowerPoint Basics

   **B)** Click **OK**

   ![Image of course list](image)

7) The Non-Cataloged Events screen now displays the event by the equivalent course name

   **A)** Confirm the Equivalent Course you selected is correct
   **B)** Change the Status to **Confirmed**
   **C)** Click **OK** to complete the conversion to an equivalent course

![Image of non-cataloged events](image)
Review Learner Cancellations

A Supervisor can monitor the cancellations of a selected learner or all their learners using the Cancellations option on the Review menu. This option is particularly useful when a learner repeatedly cancels enrollment in mandated training, such as safety training or EEO update training. Since Training Partner tracks all enrollments, cancellations, absences and incomplete classes in a learner’s training record, the Review Cancellations option is useful for identifying patterns that a Supervisor may be required to address.

To review Learner Cancellations:

1) Login to Training Partner, and click the Review menu bar to expand this section

2) Click on Cancellations

3) The Review My Learners Cancellations screen is displayed
   A) Select a Start and End date with the date picker buttons
   B) Select a Learner from the drop-down list or leave default selection to “All My Learners”
   C) Click OK
4) The information displayed reflects the number of times a learner (or learners) cancelled their enrollment in training classes between the specified dates

**Review Learner Enrollments**

Supervisor can review the current enrollments of a selected learner or all their learners by using the **Enrollments** option on the **Review** menu.

**To review Learner Enrollments:**

1) Login to Training Partner, and click the **Review** menu bar to expand this section
2) Click on **Enrollments**

[Image of the Training Partner interface]

3) The **Review My Learners Enrollment** screen is displayed

   A) Select a **Start** and **End date** with the date picker buttons
   B) Select a **Learner** from the drop-down list or leave default selection to “**All My Learners**”
   C) Select a **Status** from the drop-down list or leave default selection to “**All Statuses**”
   D) Click **OK**

[Image of the Review My Learners Enrollments interface]
4) The following screen indicates Learners that have enrolled in classes between the dates of 11/1/08 and 11/30/08

![Review My Learners Enrollments](image)

**View Reports**

Below are the available types of reports that a Supervisor can run.

**To run reports:**

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

![Menu Bar](image)
2) Click on **View Reports**

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

5) In this example, 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
Frequently Asked Questions [Supervisors]

1) I'm a supervisor, but when I log in to Training Partner I don’t have the Review bar on the left.
Your on-line role has not been set to ‘Supervisor’. You will need to contact your agency’s Training Coordinator, who will then notify the Training Partner Administrator to have your on-line role set to ‘Supervisor’.

2) I have a new employee that reports to me but I don’t see his/her name in the Unassigned Learners list.
If your staff person is a new-hire, it will take about a week from their initial start date before their name appears in the Training Partner database. If your new employee is someone who has transferred from another agency and is now under your supervision, you may need to contact their former supervisor and request that they unassign the learner (your new employee) from their Assigned Learners list so that their name is returned to the Unassigned Learners pool. You will then be able to select their name from the Unassigned Learners list.
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 schedules 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.