



Training Organization Dashboard User Guide

The **Training Organization Dashboard** is the portal through which training applications are created and submitted for Ohio Approval. This is also where training organizations schedule and manage training events. Other dashboard functions include:

- **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 access to trainings from other training organizations
 - Add trainings to a Call for Proposal

If you **are not** associated with a training organization and are an Ohio 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 already** 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:

****Please be advised that the best web browsers to use for all training organization dashboard functions are Google Chrome or Mozilla Firefox. Use of other browsers may result in unsuccessful functionality. ****

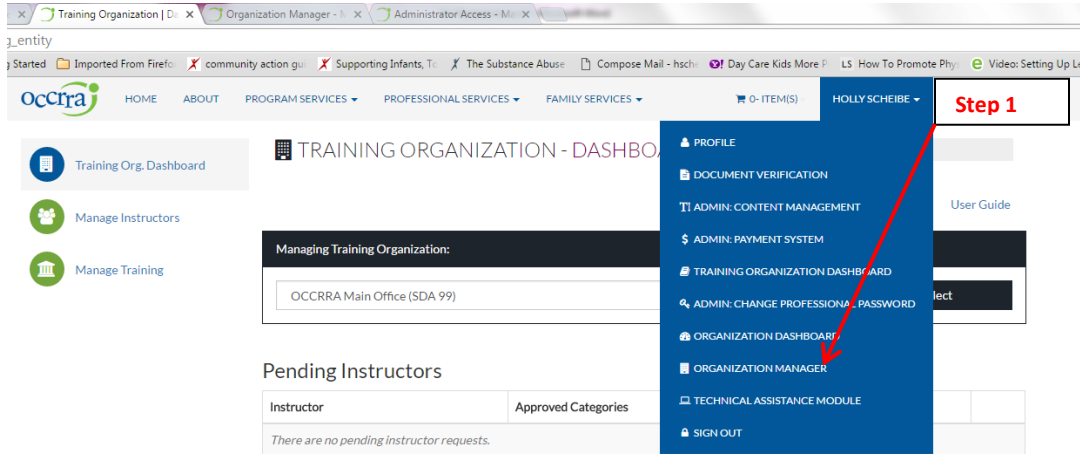
For detailed information on scheduling a training event, see page 4, [Using the Training Organization Dashboard to schedule a training event.](#)

Training Organization Dashboard – Granting Access

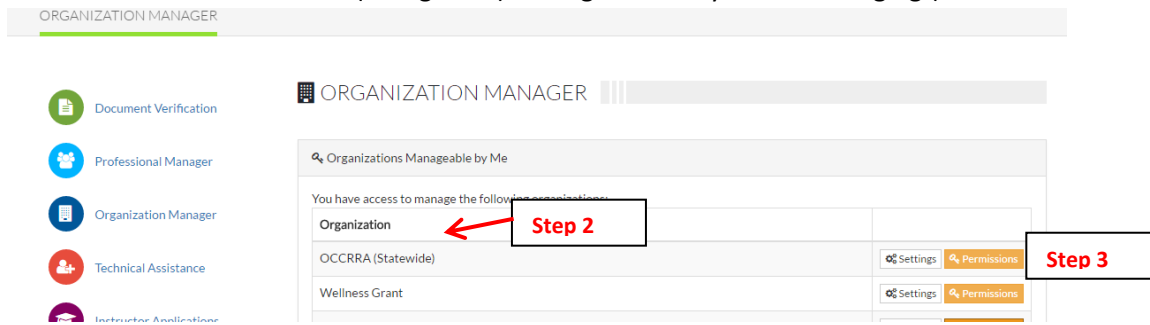
Once approved as a training organization, the organization administrator must grant permissions for other staff/users to have access to the Training Org Dashboard.

To grant access:

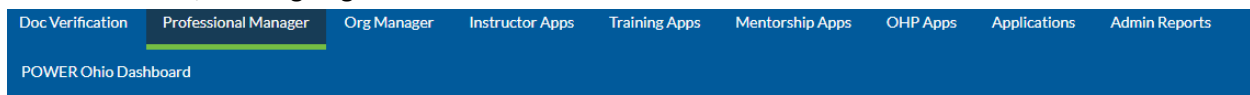
1. From the drop-down menu next to your name choose Organization Manager- Example below will look different based on user permissions.



2. Select the training organization you want to manage from the Organization list.
3. Select "Permissions" (orange box) for organization you are managing (if there is more than one)



4. Select "Add New Employee", using the employees OPIN. Type in the OPIN, then click the green "Add" button.
5. Select "Organization: Data Entry" and choose staff from drop down that you wish to grant TA Module/Training Org Dashboard access. Click "Grant".



MANAGE PERMISSIONS

Permissions for OCCRRA Main Office





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Note: With Data Entry permissions, staff can create and submit training applications, and schedule/manage training events. Only Ohio Approved instructors can be listed as the Primary Author on a training. For more information on instructor approvals, please see the ***Ohio Approved Instructor Application User Guide***.

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 **Manage Instructors** tab enables you to associate Ohio Approved instructors with your training organization. Instructors who are not Ohio Approved will not be able to be added to an organization. This function does not grant instructors access to the training organization dashboard.
4. The **Manage Training (Events)** tab enables you to:
 - Manage **Incoming Training Requests** from other training organizations. This function grants them access to schedule and manage training events for the requested training.
 - Request access to trainings from other organizations from **Outgoing Training Request**. This allows your training organization to schedule and manage training events for the requested training.
 - **Create Event:**
 - Create New Conference, New Series, New Training, New Community of Learners
 - Submit application for Ohio Approved Designation
 - Please be sure to choose the correct format, as this cannot be changed once the training application is approved.
 - Locate and manage a current training with AT# or Title
 - View Details
 - Schedule
 - Apply this training for a conference Call for Proposal
 - All trainings associated with the training organization can be displayed by clicking the green “Locate Application” button.
 - **Manage Events:**
 - Locate training events that have been scheduled
 - 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 results, use filters. To view training event details, click “Edit”.
 - **Training Information Tab**
 - Training information can be viewed/edited

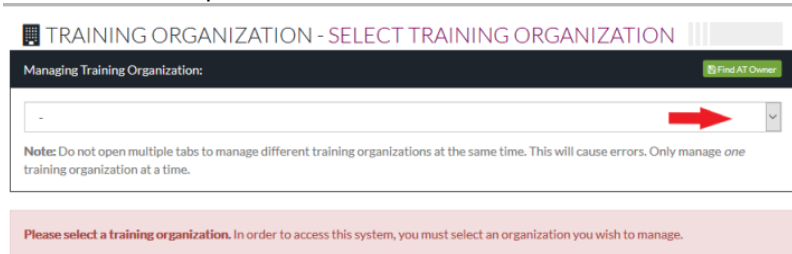
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- Attendance can be marked in **Event Sessions Step 3 View Details**: Click the box next to participant name to record attendance.
- **Materials** including the sign-in sheet, roster, and evaluation form can also be accessed in **Event Sessions Step 3**.
- Event is finalized in **Event Status, Final Step**. This step sends verification information to participants profiles.
- **Training Evaluations Tab**: Compile evaluation data
- **Registrations**
 - Manually add registrant by OPIN or name
 - Send an email to all registrants
 - Locate registrant by OPIN or name
 - View list of registrants by clicking **Locate Registrants**
 - View no-shows
- View professionals currently on the **Waitlist** (if that function has been enabled) and see those who have cancelled their registration in the **Cancellation Report**.

Using the Training Organization Dashboard to schedule a training event:

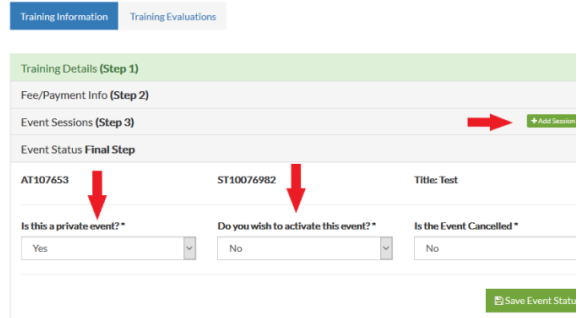
Note: Only trainings that have completed the application review process can be scheduled.

- Sign into your profile, select **Training Organization Dashboard** located in the drop-down field under your name in the top navigation bar (see screenshot above).
- **Schedule a training event:**
 - Within the **Managing Training Organization** box, choose the applicable training organization from the drop-down



- Select **Manage Training** from the left menu
- Select **Create Event** from the left menu
 - Enter the AT# or title and click **Locate Application**. To see all trainings within the dashboard, do not enter an AT/Title, just click Locate Application.
 - To the right of the training title, select **Schedule**; this will generate an ST number (ID number) for that specific event. *Each time you schedule a new training event, follow this process to generate a new ST number; ST numbers cannot be reused, and multiple training events cannot be scheduled under the same ST number. The exception to this is for trainings that involve multiple sessions. For example, if a training is to be presented in 3 parts, then it will have 3 sessions under the same ST. If a training is only 2 hours long, then only one 2-hour session per ST should be scheduled.*

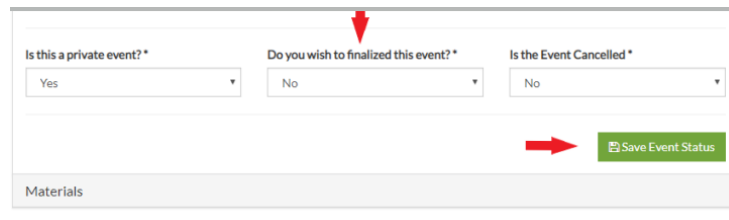
- Complete each required step. If there is no fee for the training, skip **Step 2**. **Step 3** is where you enter the specific training event details, such as date, time, & location. **Final Step** allows you to set the event as “private” or “public”; this is also where you activate the training, which opens it for participants to register.



- **Manage scheduled training events:**
 - Within the **Managing Training Organization** box, choose the applicable training organization from the drop-down
 - Select **Manage Training** from the left menu
 - Select **Manage Events** from the left menu
 - To manage events, click the **Event Status** drop-down to filter by all sessions, upcoming, pending, finalized, cancelled, or incomplete **OR** enter the ST# or Title, and click the **Locate Event** button. You can also click the **Locate Event** button alone to display all training events.
 - To manage the selected training event, Select **Edit**.
- **Manage registrants and attendance:** this function allows you to see who has registered, manually add/remove registrants, and verify attendance
 - **Manage Registrants**
 - Complete the previous steps in **Manage scheduled training events**, listed above
 - Select **Registrations Tab** – grey tab next to **Training Information, Training Evaluation**
 - Add registrants by typing in their OPIN; click their name when it appears, then click “Add”
 - To see a list of all registrants, click the green **Locate Registrants** button at bottom of the page
 - Clicking the **Remove** button cancels their registration; this should only be done upon the registrant’s request.
- **Verify or manage attendance;** there are two methods
 - Method 1:
 - **Locate the training event by following the steps under Manage scheduled training events above; go to Step 3 under Training Information and click View Details**
 - Check the box next to name of each participant that attended

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- Method 2:
 - Follow steps in Manage Registrants (above) and click the green Locate Registrants button to see entire list
 - For each participant that attended, click the **Edit Attendance** option, click the **Attended** box, and **Close**
- **Finalize training event** – this process closes the training event, and sends attendance verification to the participant profiles
 - Follow the steps above to **Manage scheduled training events**
 - Select **Event Status Final Step** under **Training Information**
 - Select “Yes” **Do you want to Finalize?**
 - **Save Event Status**



Is this a private event?*

Do you wish to finalized this event?*

Is the Event Cancelled *

Yes

No

No

Save Event Status

Materials

Questions? Please send an email to approval@ocrra.org.