Trainodize

Training Management Application

Application & User Documentation

Author: Engirted

Contents

Overview

The Trainodize application is designed to be a free training tool that System Administrators can use to organise and manage Salesforce training within their organisation.

The application will enable System Administrators:

- Deploy a booking system as a flow component where users can create, update and retrieve forgotten credentials and book, update, view and manage their training sessions.
- Easy to use interface to organize both web and classroom training sessions.
- Customisation of email, chatter, and user calendar notifications based on the type of training session being organized (web or Classroom).
- Users can view all their own personalised training record enabling them to view all the training that they have undertaken.
- Automatically manages and updates users calendar's when they have confirmed or declined a place on a training course and if a training session is cancelled or if the details of the training session changes.
- Automatically books a user on the waiting list on a course when a space becomes available.
- Sends chatter post notifications to promote and inform users when a training session has been cancelled or if the details of the training session have changed to a specified Chatter group.
- Automatically sends an email informing users who are booked on a training session it has been cancelled or the details of the training session have changed.
- Automatically sends an email when a user has confirmed, declined, attended or is added to the waiting list for a training session.
- Automatically sends an email to a user who has attended the training course asking for their feedback
- Automatically sends an email reminder 3 days before a training session is to begin to users confirmed on the training session.

- Allows the tracking of responses from users regarding training sessions.
- The application allows the customisation of field values, to tailor the application to meet the organisation needs.
- Provides reports on the users of Salesforce within their organisation in relation to what training they have undertaken.
- The application uses native Salesforce technology and is easy to install and configure.

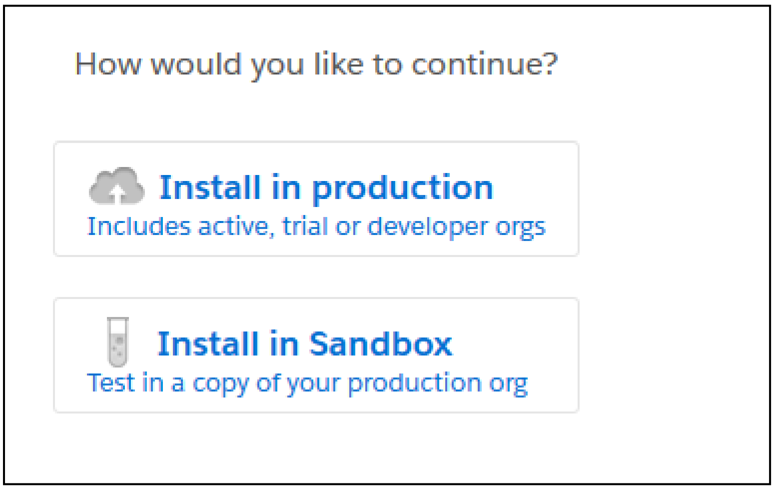
Installing the Trainodize Application

1) Go to the Salesforce App Exchange - https://appexchange.salesforce.com/

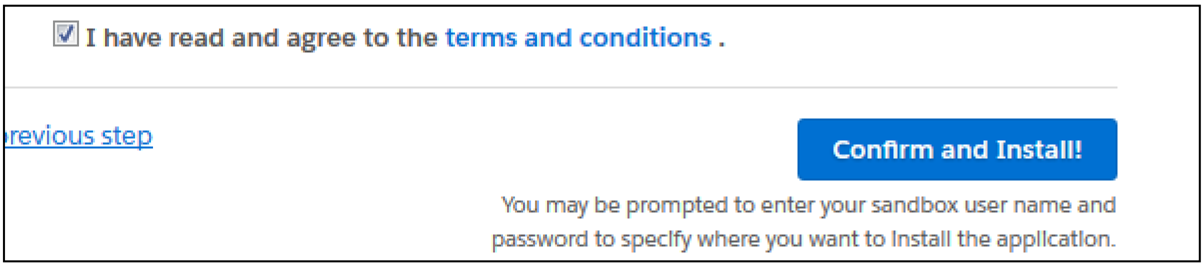
2) Click on the 'Login In' button to the Salesforce app exchange button and enter you Salesforce credentials.

3) Locate the Trainodize App and Click on the 'Get It Now' button.

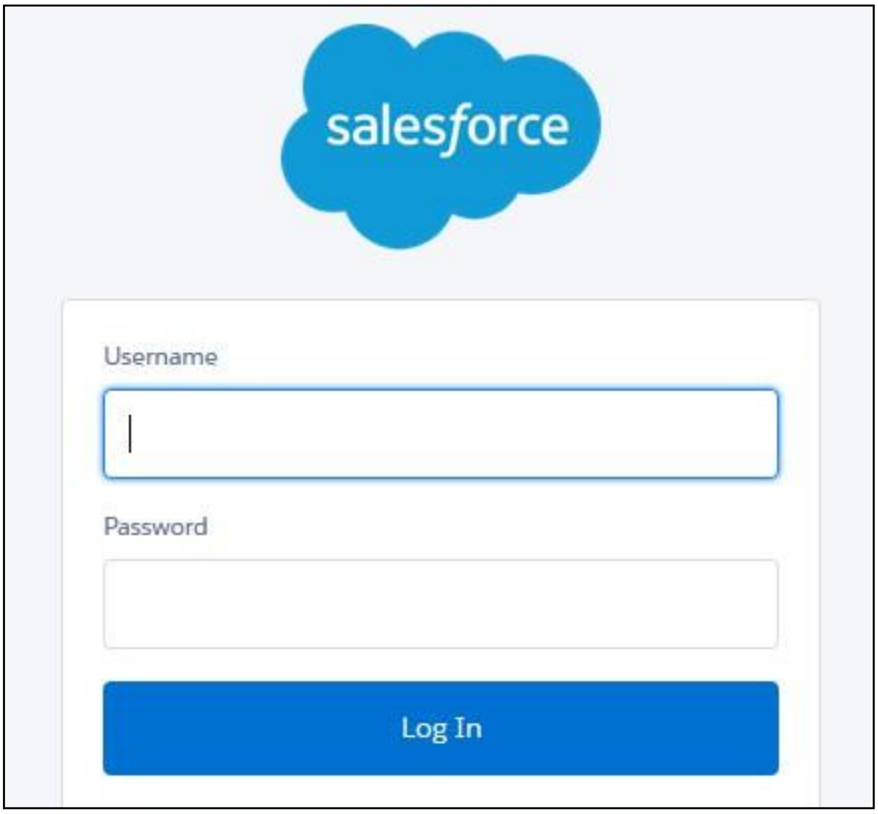
4) Select where to install the application in production or a sandbox.



5) Check the agreement box and click the 'Confirm & Install button'.



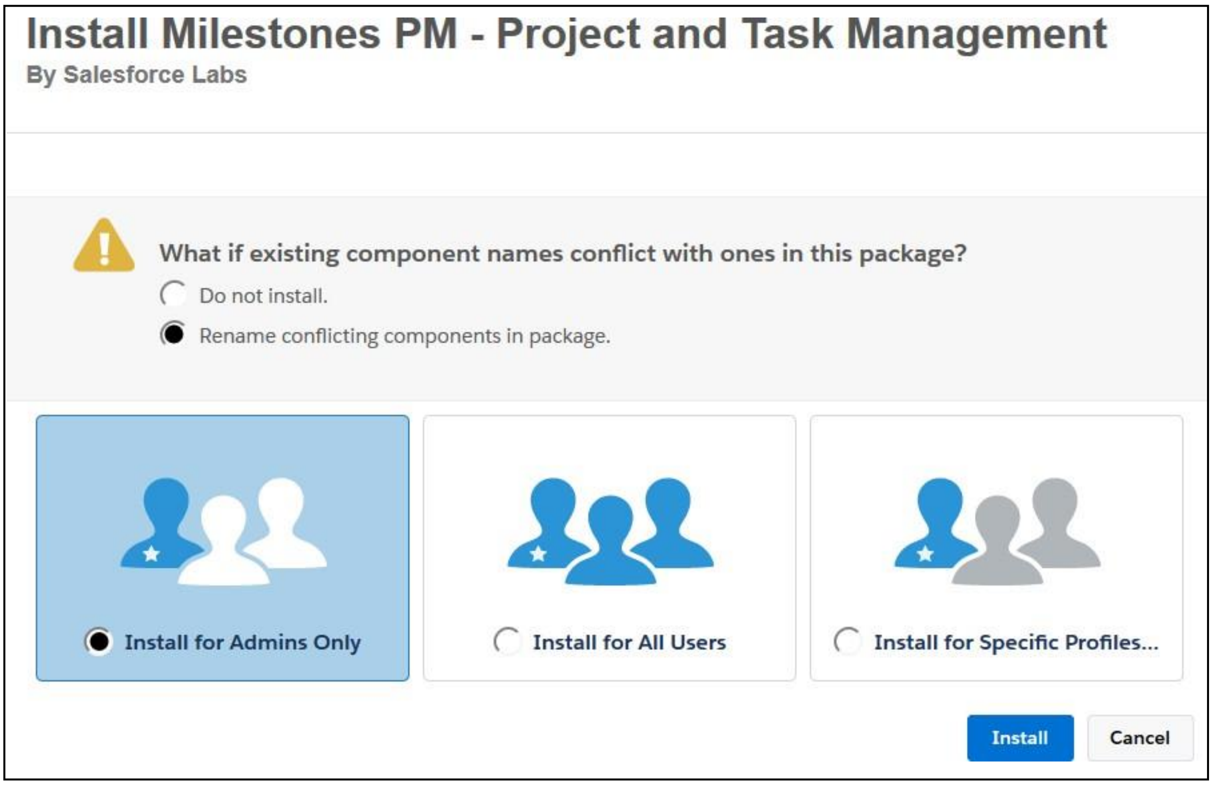
6) Enter your Salesforce Credentials



7) When prompted:

a) Select Rename conflicting components in package

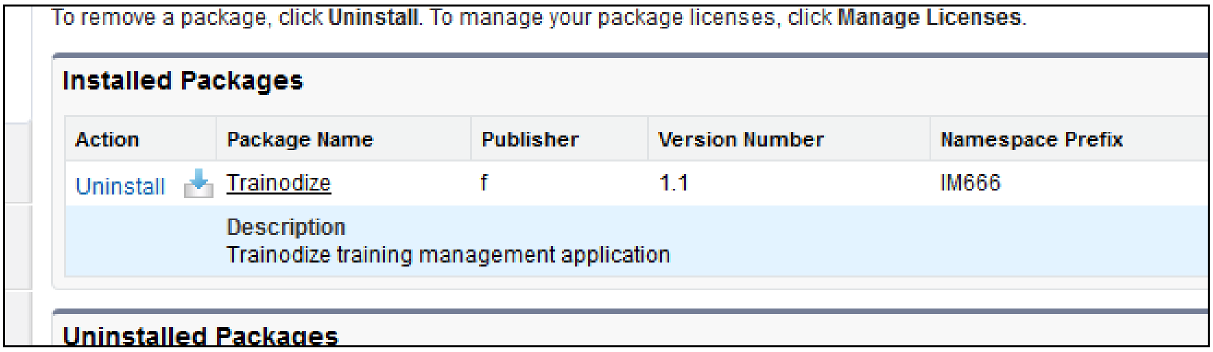
b) Select the ‘Install for Admins’ Only checkbox



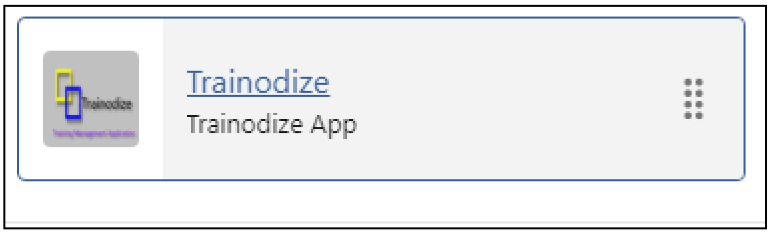
8) Click on the Install button

9) An email will be sent to your inbox when the installation is completed.

10) Click on the ‘Setup’ Link in the top right hand corner of the Salesforce org & select the ‘Installed packages’ link in the setup Administration area on the left hand side of the screen. The Trainodize package will be installed in the org.



11) In Salesforce Lightning the app should be installed



Configuring the Trainodize Application

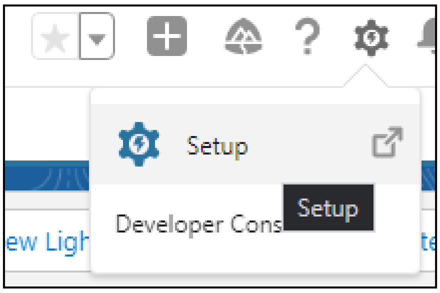
For the application to work correctly the application needs to be correctly configured.

The following section outlines the areas that need to be configured for the application to work correctly.

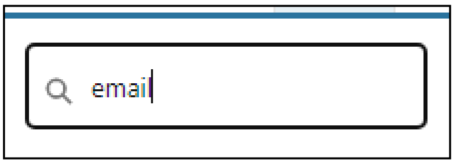
Email Settings

Ensure email settings have been configured so that email can be sent via Salesforce

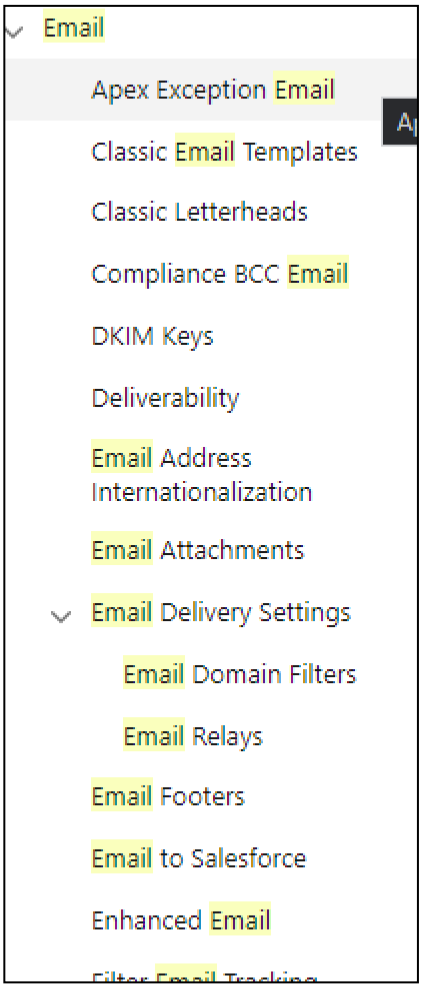
- Click on Set Up



- Type in Email in the Box

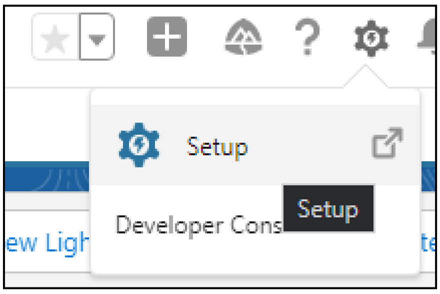


- Review Setting e.g., Deliverability Access to Send Email is set to All Email etc.



Activate Flows

- Click on Set Up Menu Link



- Click on Flows

- Active the following Flows

Attendees Flows

Active New Training Session

Training Session Flow

Trainodize Training Booking System

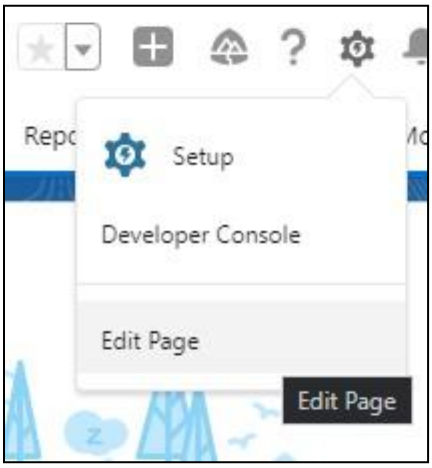
Deploy the Trainodize Training Booking System Flow Component

If you want to use the flow Component Salesforce Lightning version will be needed.

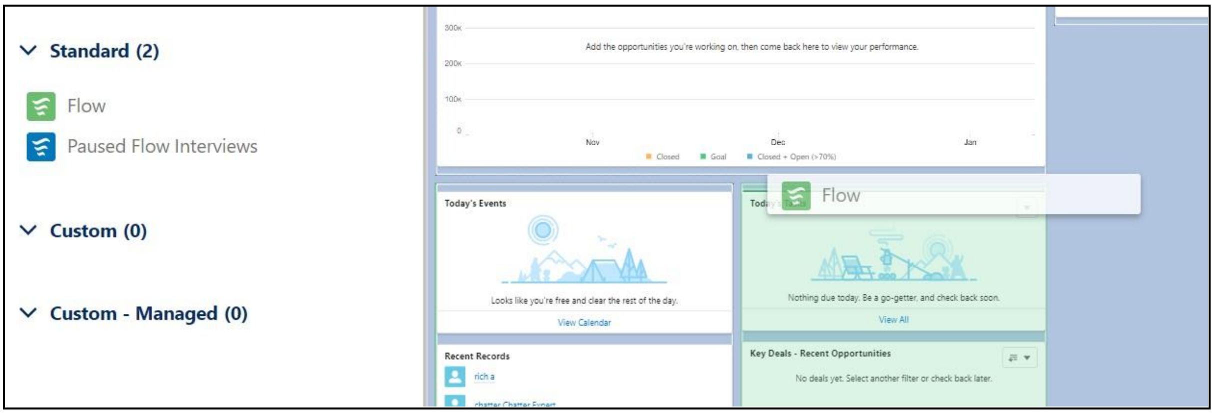
Select the page you would like the component to be made available to users.

It is suggested that you use a home page.

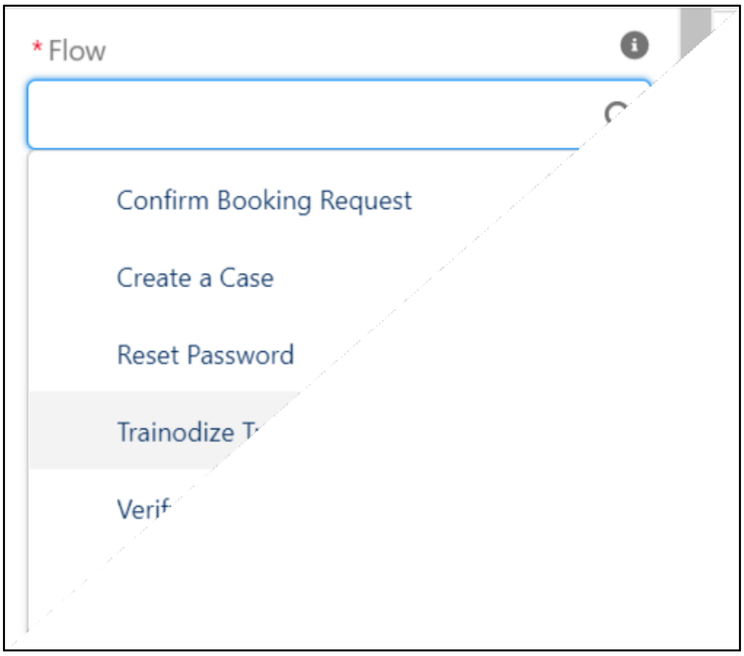
- Select the page you wish the Flow component (booking system) to be deployed.
- Click on the Gear Icon and Select Edit Page



- Drag the Flow Component on the page



- Select the Trainodize Training Booking System flow

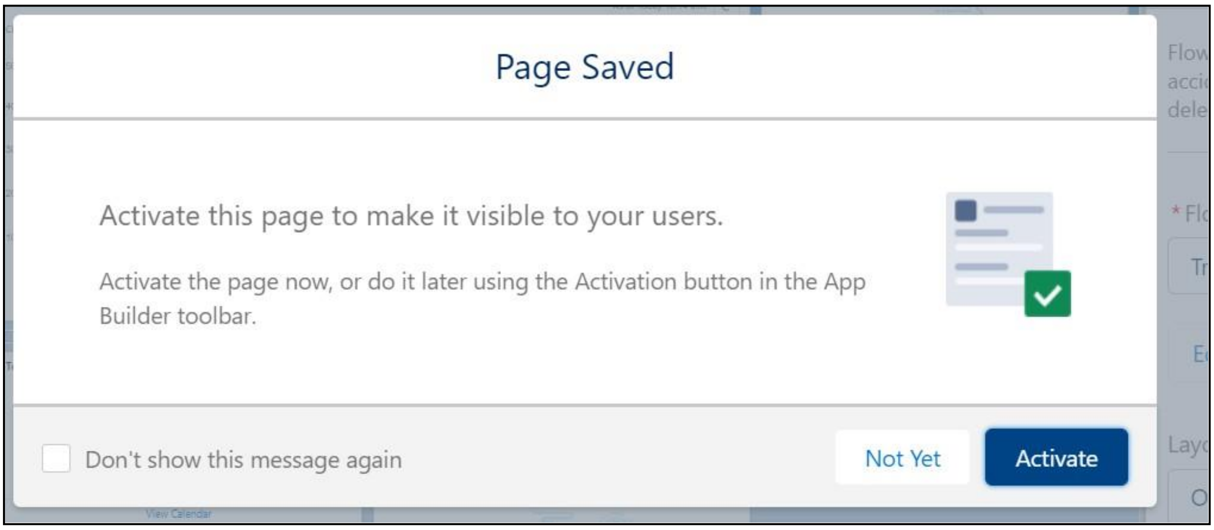


Note:

If the flow is not available ensure the flow has been activated

- Click Save

- Activate and assign the page



User Settings

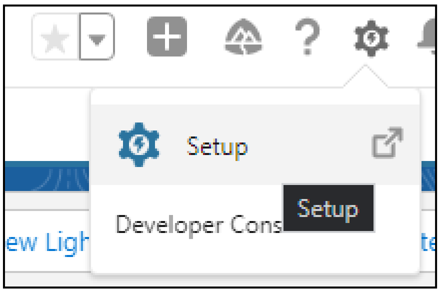
If the booking system is to be deployed then users will need to have certain user configurations enabled:

1) Attendance object User Configuration
2) Training object User Configuration
3) Have the correct flow permissions (Run a flow)

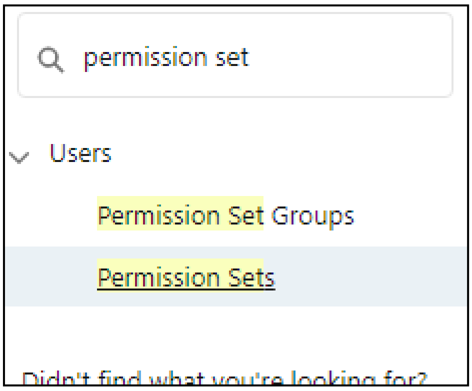
It is suggested that you use a permission set or if you have Custom Profiles, you can change the Object Settings on the custom profile.

Permission Set

- Click on Set up.

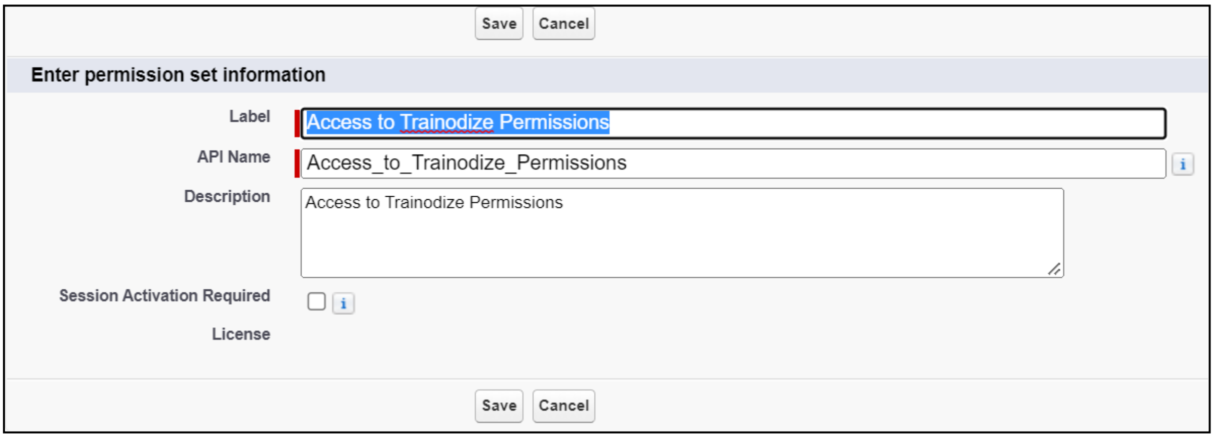


- Type in Permission Set in the Set up box and Click on Permission Set



- Click on the New Button

- Enter the Following Information



Label

API Name

Description

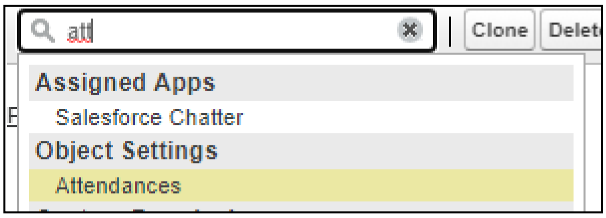
Select a License Type if necessary

- Click on Save

<u>Attendance Object User Configuration</u>

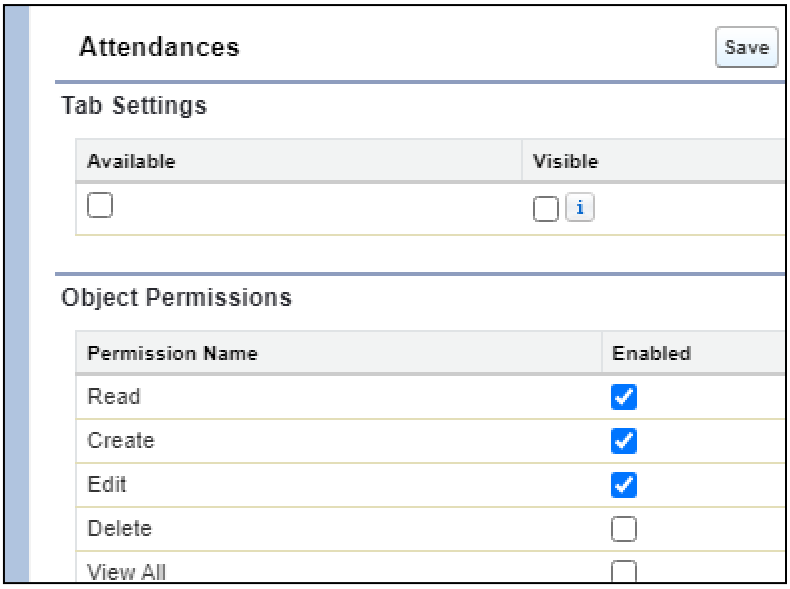
- Select Object Settings

- Select on Attendances Object

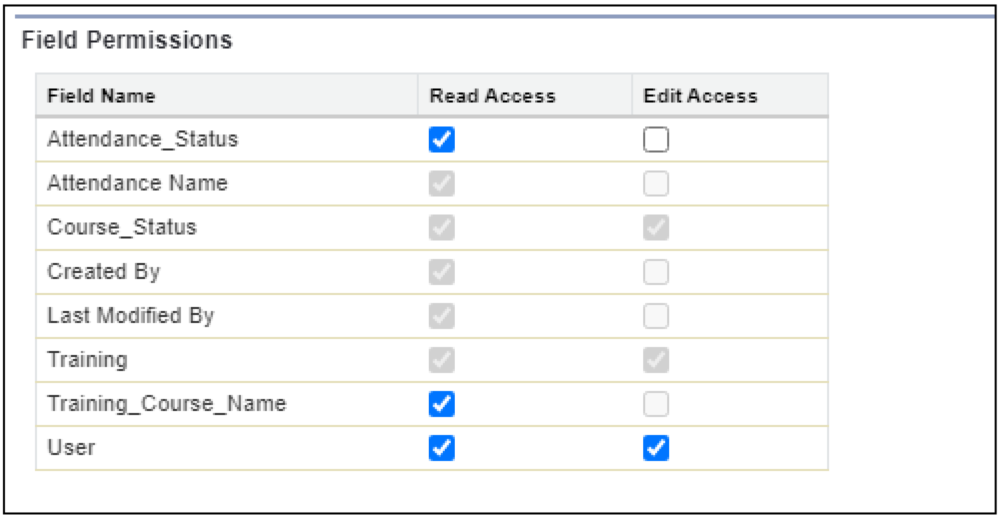


- Click on Edit

- Check the View, Create and Edit check boxes and Click Save



- Scroll down to the Field Permissions section

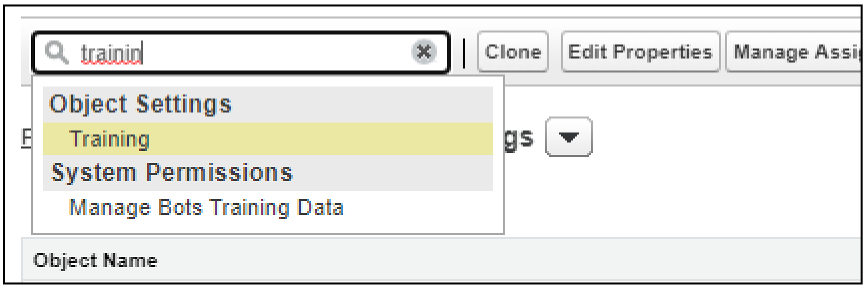


- Make sure the User field has Read & Edit Access and the Attendance status and Training Course Name have read access and the other fields have the above access levels.

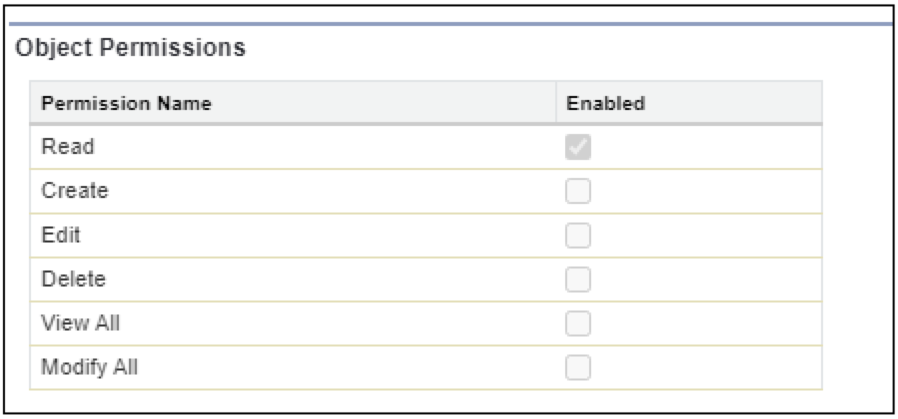
Training Object User Configuration

- Select Object Settings

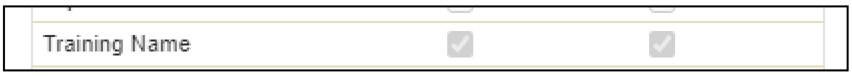
- Select on Training Object



- Make sure the Training Object has Read permission



- Scroll down to the Field permissions



- Ensure the Training Name has read and edit permissions

Flow Permissions

- Click on the System Permissions link

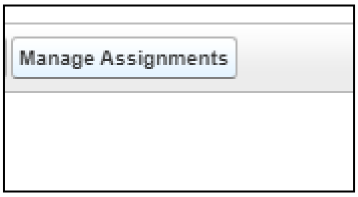
- Click on the edit button

- Check the Run Flow box

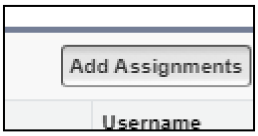
- Click the Save button

Add Users to the Permission Set

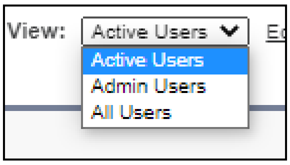
- Click on manage Assignments button



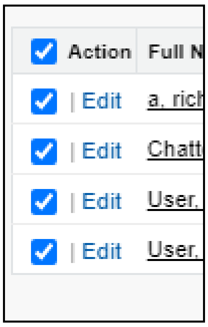
- Click on Add Assignments



- Select all active users or the Users to add to the Permission Set

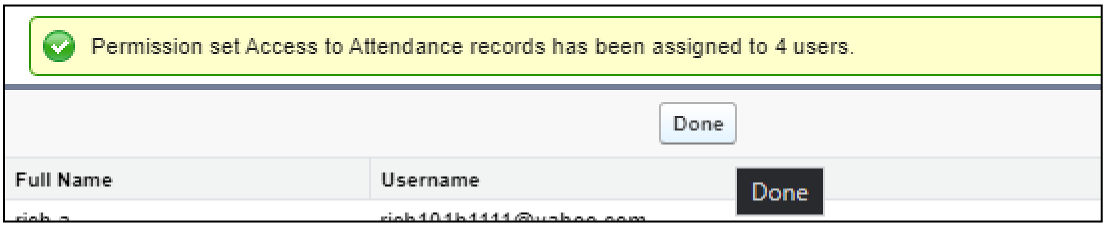


- Select Users to add to the permission Set



- Click on the Assign Button

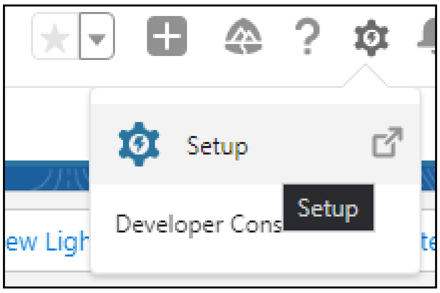
Click the Done button



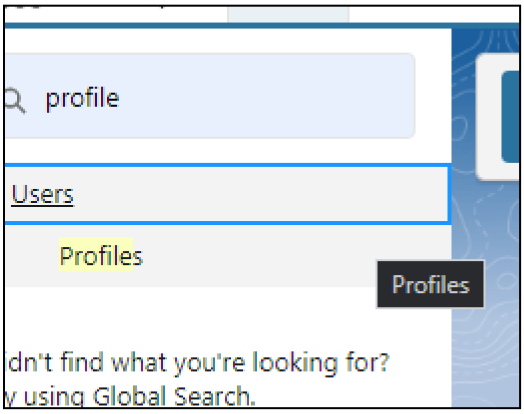
Users will now be able to create and update and their training records and run the flow.

<u>Custom Profiles</u>

- Click on Set Up



- Type in Profiles in the Box and click on the Profiles link.

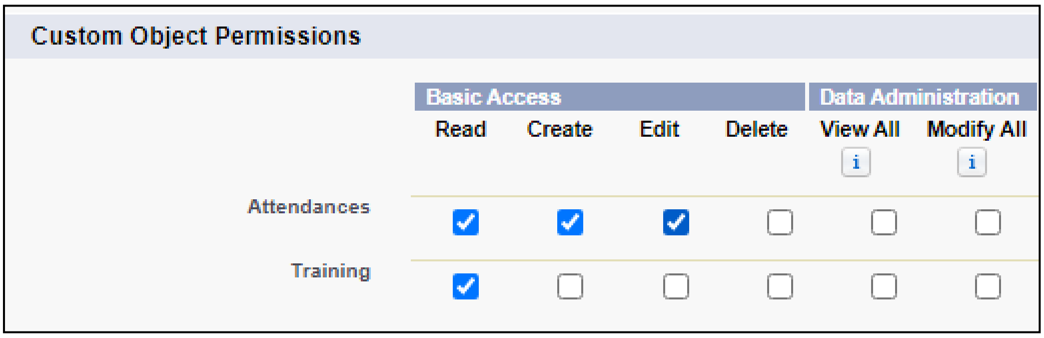


- Click on the Custom profile

- Click on the Edit button

Attendances Object User configuration

- Scroll down to Custom Object Permission and check the Read, Create and Edit checkboxes for the Attendances object



Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Attendances	☑	☑	☑	☐	☐	☐
Training	☑	☐	☐	☐	☐	☐

- Click on the Attendances Custom field level Security link

Custom Field-Level Security	
Attendance	[View]
Training	[View]

- Ensure the User,Training_Course_Name, Course_Status and Attendance_Status have Read and Edit access and other fields have the access level in the screenshot below.

Field Name	Field Type	Read Access	Edit Access
Attendance_Status	Picklist	✓	✓
Attendance Name	Auto Number	✓	
Course_Status	Picklist	✓	✓
Created By	Lookup	✓	
Last Modified By	Lookup	✓	
Training	Lookup	✓	✓
Training_Course_Name	Text	✓	
User	Lookup	✓	✓

Training Object User configuration

- Scroll down to Custom Object Permissions and check the Read checkbox for the Training object.

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Attendances	☑	☑	☑	☐	☐	☐
Training	☑	☐	☐	☐	☐	☐

- Click on the Training Custom field level Security link

Custom Field-Level Security	
Attendance	[View]
Training	[View]

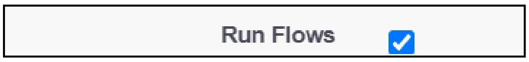
- Ensure the Training Name has Read and Edit access

Training Name	Text	✓	✓

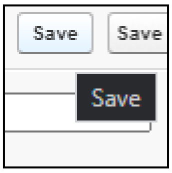
Flow Permissions

- Scroll down to the General User Permissions Section of the profile.

- Check the Run Flows Permission

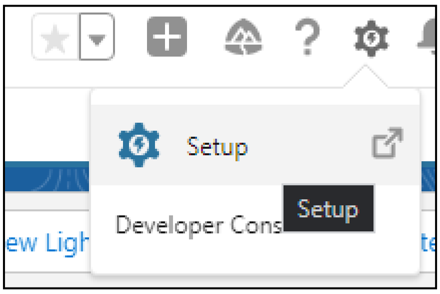


- Click on the Save button

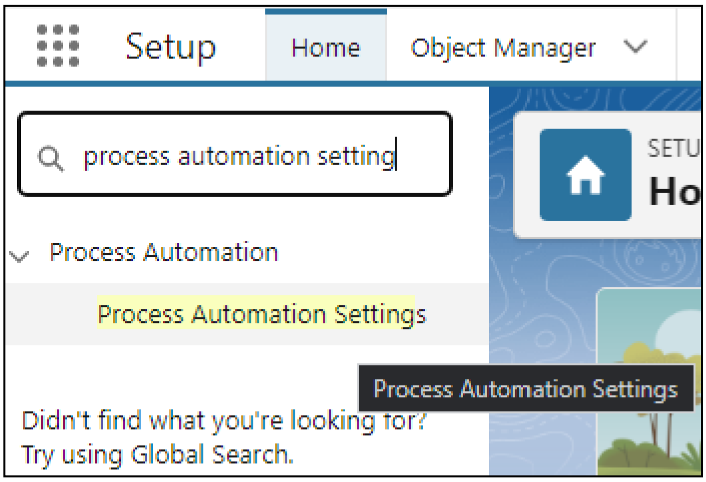


Process Automation Settings

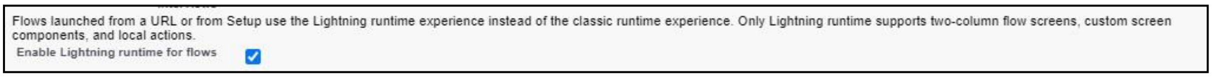
- Click on Set Up



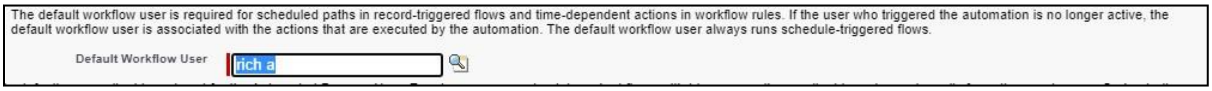
- Type in Process Automation Settings in the Box and click on the Process Automation Settings link.



- Check the ‘Enable Lightning runtime for Flows’ checkbox

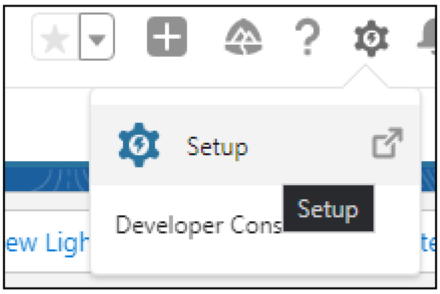


- At the top of the page select a Default Workflow User.

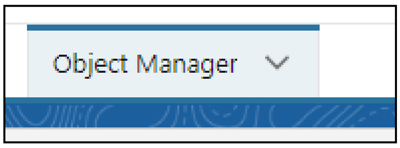


<u>Add User Fields to Page Layout</u>

- Click on the Set Up Link



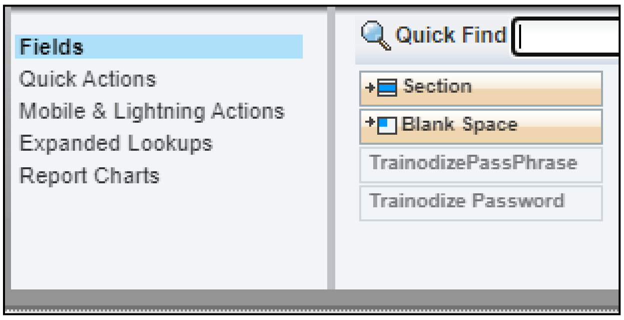
- Click on Object Manager



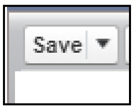
- Click on the User object

- Select Page Layout and click on ‘Edit’ next to User layout

- Add the Trainodize Password field and the Trainodize PassPhrase field to the page layout.



- Click Save



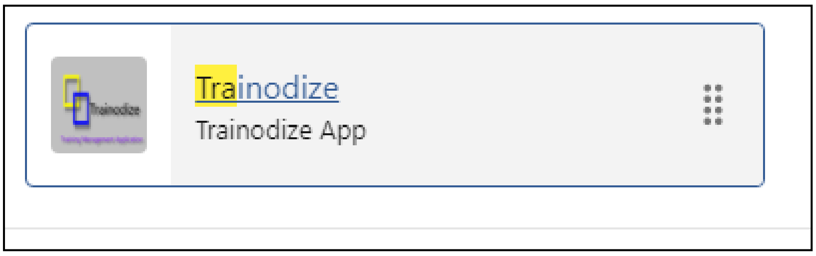
Note:

Trainodize password and Passphrase are unique and case sensitive. This means the user needs to enter their credentials exactly and there are can be no duplicate values for these fields.

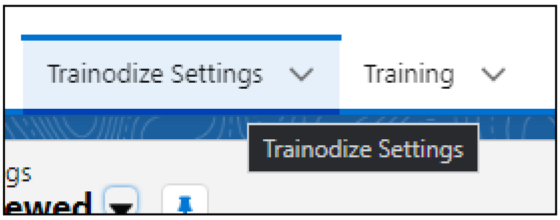
Should there be any issues entering or creating login credentials this could be the reason why.

Configure Chatter Settings

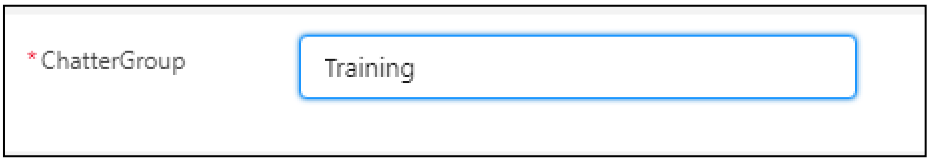
- Click on the Trainodize App



- Click on the Trainodize Settings Tab and click on the 'NEW' button.



- Type **EXACTLY** the name of the chatter group that you would like to post training notifications to.



Note:

The flow only selects the first record in the objects.

- Click on 'Save' button

Technical Aspects of the Trainodize Application

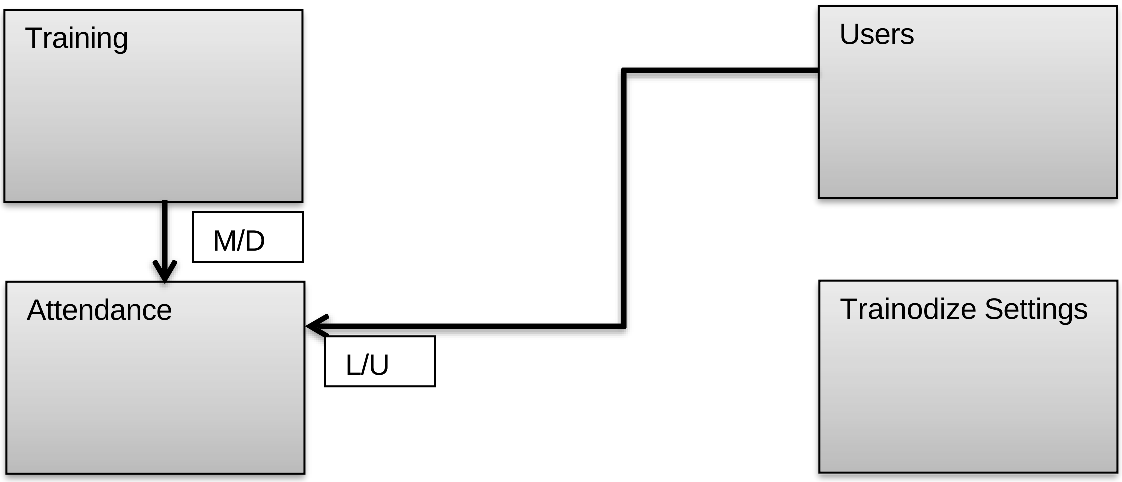
Trainodize Application Schema

The following diagram highlights the relationships between the different objects used in this application.

Key:

M/L – master detail relationship

L/U – lookup relationship



Editions Supported

All editions of Salesforce can use the Trainodize application.

Package Type

- Managed

Trainodize User Booking System

- See the user guide Trainodize User Booking System for more information

Flow Processes

- See the ‘Trainodize Flow Processes documentation’ for more information

Salesforce Version

- Trainodize is both Salesforce Classic and Lightning compliant

Application Components

The application has the following components:

- 3 Objects
- 1 App
- 4 Flows
- 26 Custom Fields
- 1 Static Resource
- 2 Tabs
- 4 Page Layouts
- 2 Report Types
- 1 Report Type
- 7 Validation Rules

Training Object

Custom Tab

Training

Standard Fields

Field Label	Field Name	Data Type
CreatedBy	CreatedBy	Lookup(User)
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)
Training Session Name	Name	Text(80)

Custom Fields & Relationships

Field Label	API Name	Data Type
Attended	Attended__c	Roll-Up Summary (COUNT Attendance)
Audience	Audience__c	Picklist
Confirmed	Confirmed__c	Roll-Up Summary (COUNT Attendance)
Declined	Declined__c	Roll-Up Summary (COUNT Attendance)
End Time	End_Time__c	Date/Time

Level	Level__c	Picklist
Location	Location__c	Picklist
Not Attended	Not_Attended__c	Roll-Up Summary (COUNT Attendance)
Notes	Notes__c	Text Area(255)
Webinar Link	Webinar_Link_c	URL(255)
Training Places Remaining	Training_Places_Remaining_c	Formula (Text)
Start Time	Start_Time__c	Date/Time
Status	Status__c	Picklist
Topic	Topic__c	Picklist
Training Places	Training_Places___c	Number(8, 0)
Waiting List	Waiting_List__c	Roll-Up Summary (COUNT Attendance)

<u>Validation Rules</u>

Rule Name	Error Location	Code	Error Message
add_attendance_when_session_complete	Top of Page	and(or(ispickval(Status__c ,"Active"), ispickval(Status__c ,"Cancelled")), or(Not_Attended__c >0, Attended__c >0))	You can only add an attendance to the user record after the training session has been delivered and the training session has a status of "Completed"

End_date_greater_than_start_date	End Time	End_Time__c <= Start_Time__c	The end date / time needs to be greater than the start time / date of this training session
number_of_places_not_exceeded	Top of Page	And(RecordType.DeveloperName ="Classroom_Training" , value(IM666__Training_Places_Remaining__c) < 0)	The number of places on this course has already been filled. Please add this user to the waiting list for this training course.
valid_number_of_places	Training Places	and(RecordType.DeveloperName ="Classroom_Training", or(ISBLANK(IM666__Training_Places__c), IM666__Training_Places__c <= 0))	You need to enter the number of places available on a classroom training session

Page Layouts

Classroom_Training & Web_Training

Record Types

Classroom_Training & Web_Training

Attendance Object

Standard Fields

Field Label	Field Name	Data Type	Indexed
Attendance Name	Name	Auto Number	✓
Created By	CreatedBy	Lookup(User)	
Last Modified By	LastModifiedBy	Lookup(User)	

Custom Fields & Relationships

Field Label	API Name	Data Type	Indexed
Attendance_Status	Attendance_Status__c	Picklist	
Course_Status	Course_Status__c	Picklist	
Training_Session	Training_Session__c	Master-Detail(Training)	✓
User	User__c	Lookup(User)	✓
Training_Course_Name	IM666__Training_Course_Name__c	Formula (Text)	

Note: There is a filter on the user look up field to only show active users in the Salesforce platform.

Validation Rules

Rule Name	Error Location	Code	Error Message
Waiting_List_not_need_for_web_training	Course_Status	and(IM666__Training_Session__r.RecordType. DeveloperName ="Web_Training",ispickval(IM666__Course_Status__c ,"Waiting List"))	You do not need to add someone to a Waiting List for a Web Training session.Please select another course status
need_to_select_a_user	User	isblank(IM666__User__c)	You need to select a user to attend a course
need_to_selct_a_course_status	Course_Status	isblank(Text(IM666__Course_Status__c))	Please select a course status for this attendee on this training session

Page Layouts

Attendee Layout

User

Custom Fields & Relationships

Field Label	API Name	Data Type	Indexed
Trainodize Password	IM666__Trainodize_Password__c	Text(255) (Unique Case Sensitive)	✓
TrainodizePassPhrase	IM666__TrainodizePassPhrase__c	Text(255) (Unique Case Sensitive)	✓

Trainodize Settings

Custom Fields & Relationships

Field Label	API Name	Data Type
ChatterGroup	IM666__ChatterGroup__c	Text(255

Standard Fields

Field Label	Frild Name	Data Type	Indexed
CreatedBy	CreatedBy	Lookup(User)	
Last Modified By	LastModifiedBy	Lookup(User)	
Owner	Owner	Lookup(User,Group)	✓
Traindize Settings	Name	Auto Number	✓

Page Layouts

Trainodize Settings Layout

Report Types

Label	Description	Category
Training Report	report on users attending training sessions	Other Reports

Customisation & Configuration

Fields

The values in some fields can be modified and customised to meet the needs of the organisation.

The fields that can be edited in regard to the details of the training session are:

Location: Location the training is to take place. This is only required for a classroom training session.

Level: The level the training session is aimed at. Current values available are Basic, Intermediate and Advanced.

Audience: Target Audience for the training session. Current values available are All Staff and Super Users.

Topic: The subject area relating to the name of the training session.

Profile Settings

These are the profile settings suggested for System Administrators only organising and managing training events within an organisation.

The System administrator profile needs to have full read / write access on the training and attendance objects.

Users will need access to the Attendance object and be able to read, edit and create records and the Training Object to view records and have the 'Run Flow' permission. See – User Settings section of this document

Page Layouts

The page layouts Classroom_Training Layout and Web_Training and Trainodize Settings Layout should only be assigned to the system administrator profile only.

The Classroom_Training and Web_Training record types should be assigned to the system administrator only.

Trainodize App

This should only be accessible to System Administrators

Reports

The application comes with a custom report types:

- Training Report

Training Report: This report can be used as a method of compiling an attendance list for a particular training session and analysis of training sessions that are run by the Salesforce Team within an organisation.

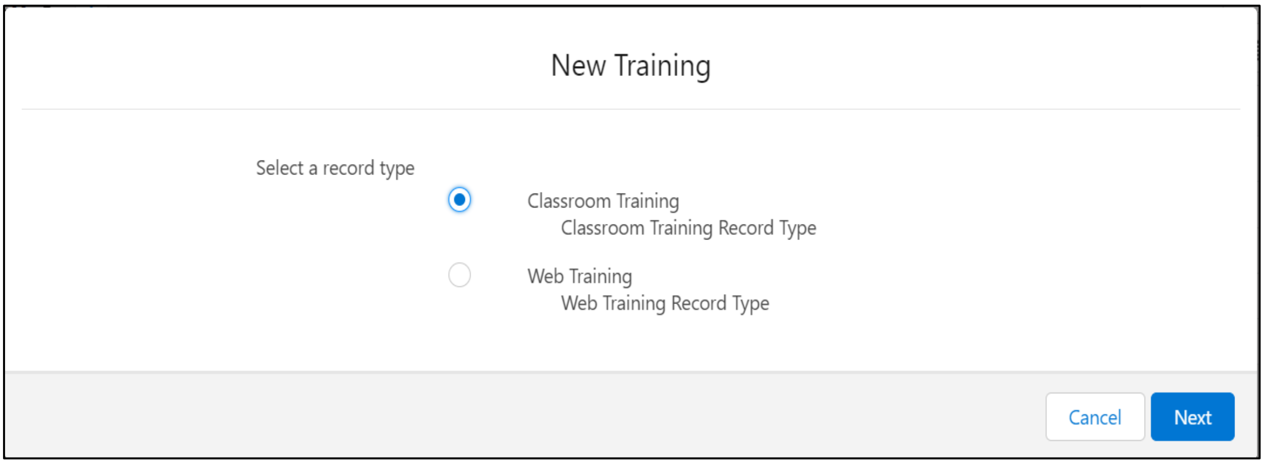
User Guide to the Trainodize Application

Setting up a new Training Session

- Click on the Training Tab

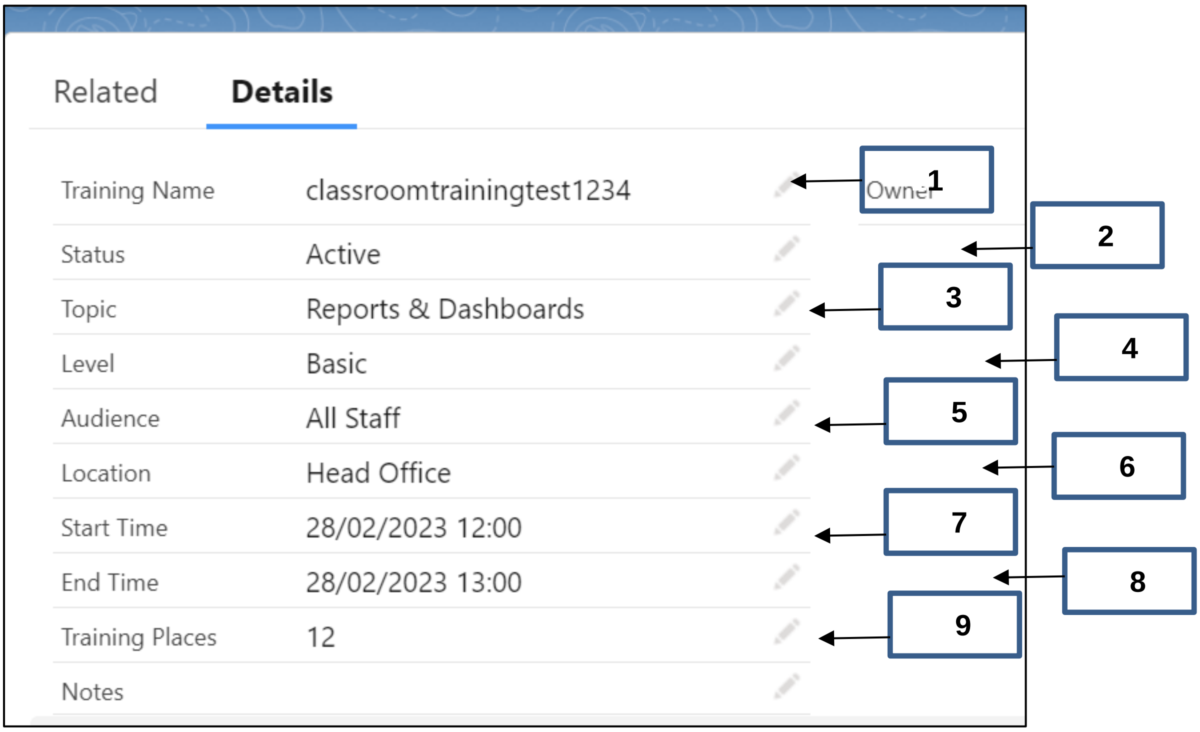
- Click on the new button

Select the type of Training session that you are organising:



Organising a Classroom Training Session

- After selecting the Classroom Training option and Clicking on Next enter the following information:



1) Enter a name for the training session.
2) Default value for status is Active. Other options are Cancelled & Completed.

   Note: Do not delete the 'completed' option otherwise validation rules will be affected.

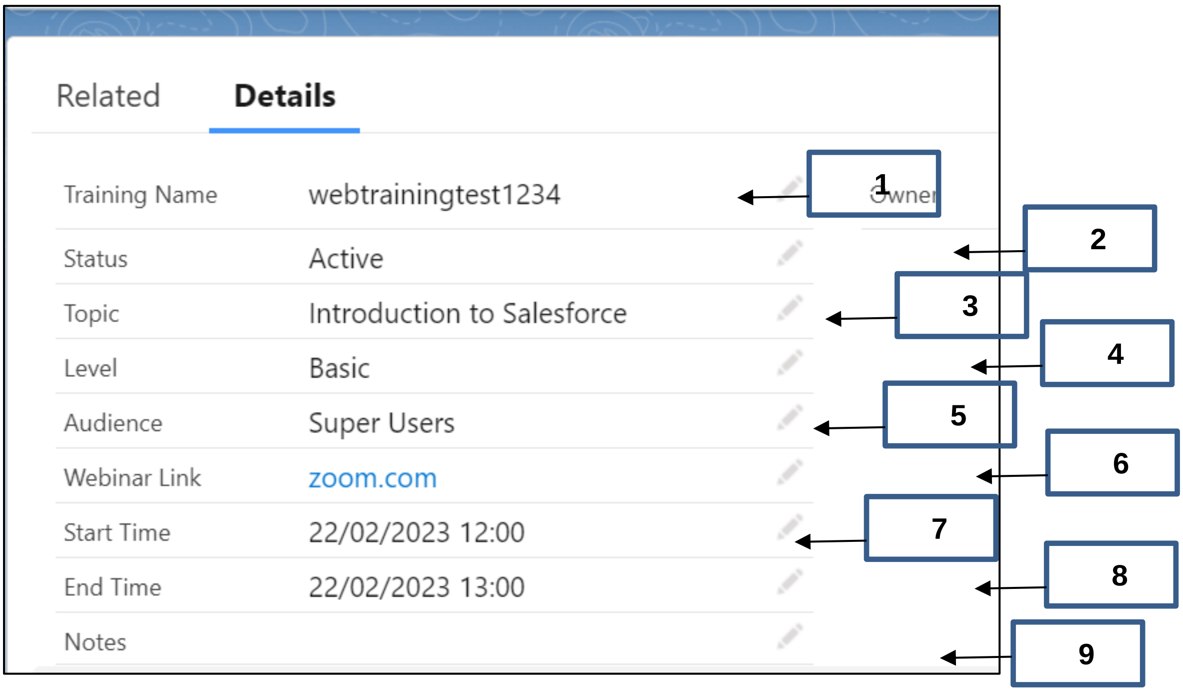
3) Enter a topic area that the training session relates to.
4) Select a level for the Training course. Current options are Basic, Intermediate, Advanced.
5) Select the Audience for the Training session.
6) Select a location for the training session.
7) Select a start time and date for the training session.

8) Select an end time and date for the training session. The end time / date needs to be greater than the start time and date field.

- Add any notes that you need regarding this training session Click the save button to save the details of the training session.

Organising a Web Training Session

- After selecting the Web Training option and Clicking on Next enter the following information:



1) Enter a name for the training session.

2) Default value for status is Active. Other options are Cancelled & Completed.

   Note: Do not delete the 'completed' option otherwise validation rules will be affected.

3) Enter a topic area that the training session relates to.

4) Select a level for the Training course. Current options are Basic, Intermediate, Advanced.

5) Select the Audience for the Training session.

6) Enter the Webinar link

7) Select a start time and date for the training session.

8) Select an end time and date for the training session. The end time / date needs to be greater than the start time and date field.

9) Add any notes that you need regarding this training session

- Click the save button to save the details of the training session.

Notes:

- You need to resolve any errors before a record can be saved to Salesforce.

- Depending on whether you choose a web or classroom based training session depends on what fields and values need to populated. The table below outlines the values required in each case:

Field Name	**Training Type**	
	Classroom	**Web**
Training Session Name	Required	Required
Topic	Required	Required
Level	Required	Required
Audience	Required	Required
Status	Active	Active
Location	Required	N/A
Start Time	Required	Required
End Time	Required	Required
Training Places	Required	N/A
Notes	Optional	Optional

- One – One Training: Sometimes an Administrator has to undertake training at a user's desk. To record this on the application regard this as a classroom training session and add the user to the training session as before to document the training session.

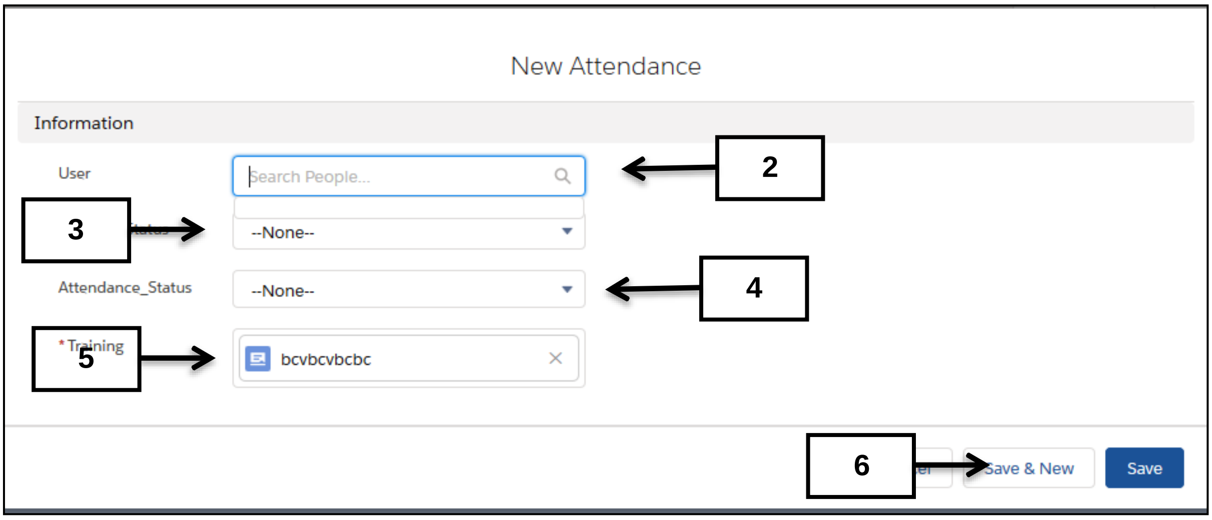
Notes & Attachments Related List

Use the Notes and Attachments on the related list to add any training material regarding the training session.

Adding Attendees to a Training Session

This section is for when System Administrators have to book training places manually.

1) Click on the Related Tab and click on the New button



2) Click on the look up button and select a Salesforce user to add to the training session.

3) Select a course status. The values available are Declined, Confirmed and Waiting

list.

Note: Do not delete or edit the options supplied otherwise validation rules, roll up summary fields and formula fields will be affected.

The 'Waiting list' option is not available for web training sessions.

4) The Attendance status can be added later after the training session has been completed to record who attended and did not attend the event.

   Note: The training session status needs to be changed to "Completed" before an attendance status can be added to a user record.

   An automated email be sent when the status is set to 'Attended' asking for feedback on the training course

   Do not delete or edit the options supplied otherwise validation rules and roll up summary fields will be affected.

5) This is the training session the user will be added to.

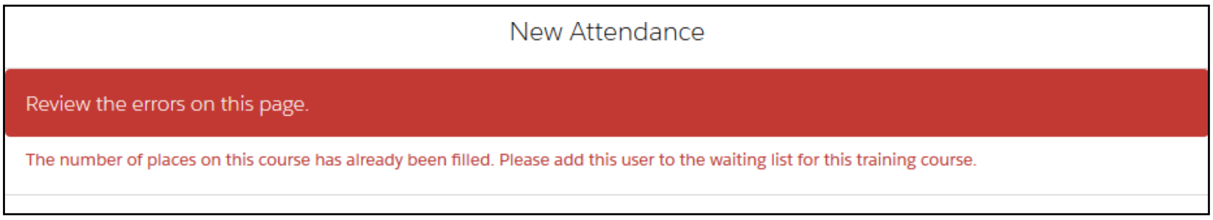
Note: To return to the main training click on this link when you have completed adding the user / users to the training session.

6) Click on save to save the details for the user attending the training session or 'Save & New' to add additional attendees.

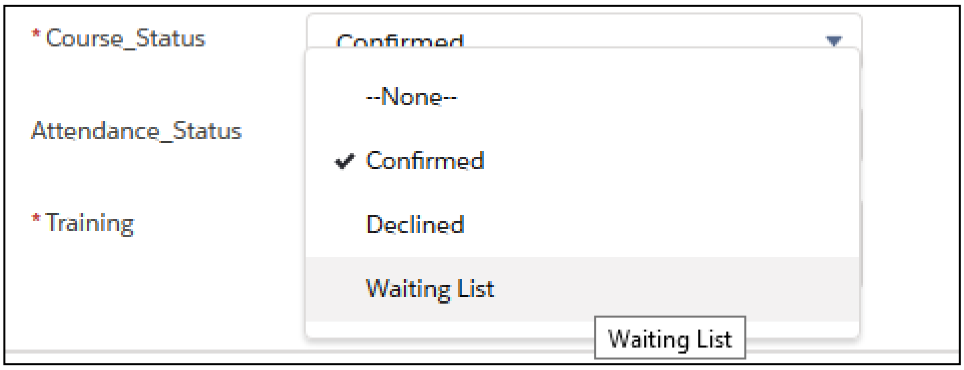
The user(s) will now be added to the attendance related list.

Adding Attendees to the Waiting list

If you try and add a user to a training session when there are no more places available the following error message will occur.



In this case you can add this user to the waiting list by selecting the Waiting list value in the course status field.



The user will then be added to the waiting list for this training session.

You can see when they were added to the waiting list by using the created or last modified date.

Users can then be in a queue for places for training session should a place become available for the training session.

A flow will automatically allocate a space to a user when it becomes available on a classroom training session

Mass Import Attendees to a Web Training Session

For Web Training Sessions it may be easier to mass import attendees.

To undertake this process:

1) Create a Web Training Session.

2) Run a User Report in Salesforce and export all active users information making sure the user id field is included in the document.

3) Document the course status of the users e.g. Confirmed or Declined.

4) Create an import file mapping the following database fields with the relevant information:

User: User ID

Course status: Declined or Confirmed

Training: Training ID

5) You can now use the Data Import tool or a 3rd Party application like Dataloader to import the attendees to that Training session.

Mass Updating Attendees Training Session.

To mass update the Attendance Status of users after a training session has been completed:

1) Run a Training Report for a training session (See Report section of this documentation) and included the attendance id field in the export file.

2) Create a file, mapping the following database fields with the relevant information:

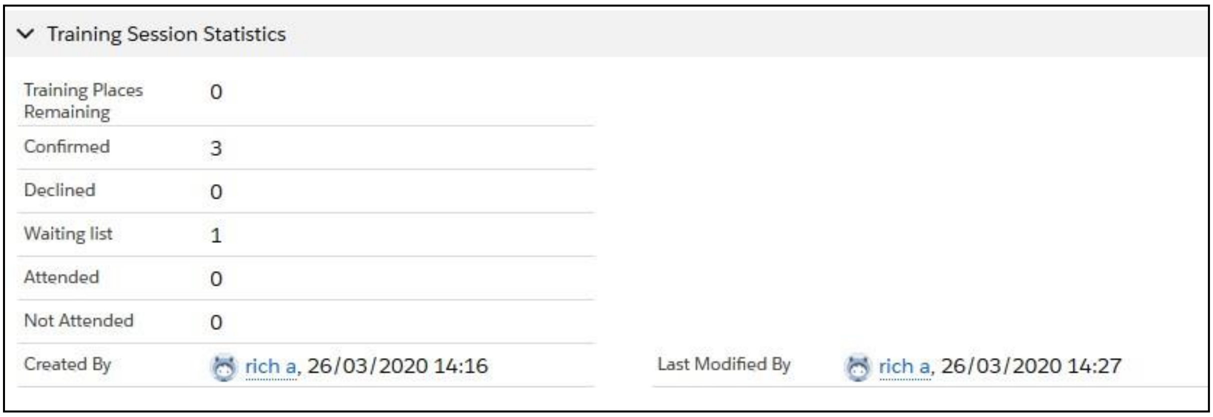
Attendance id: Attendance id

Attendance Status: Attended or Not Attended

3) Make sure the Training session status is set to ‘Completed’.

4) Use the Data Import Wizard or Dataloader to update the status of the training session.

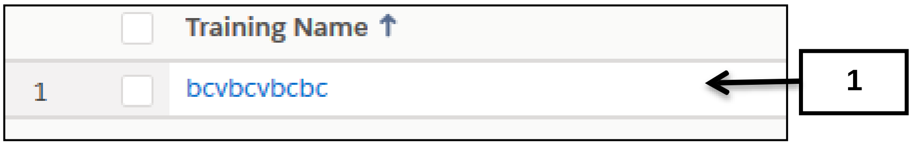
Training Session Statistics



The training session statistics will automatically be updated depending on the statuses of the attendees for that training session.

Cancelling a Training Session

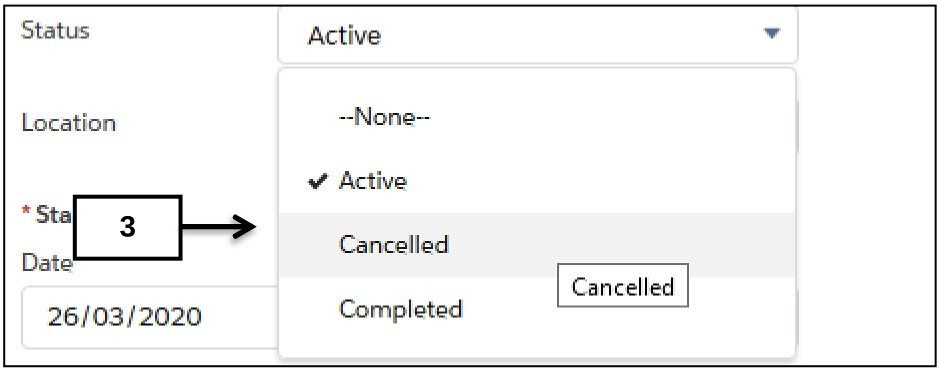
1) Select the training Session you wish to Cancel



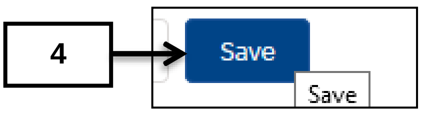
2) Click on the Edit Button or Pencil Icon next to the Status Field

Or

3) Select Cancelled from the Status field



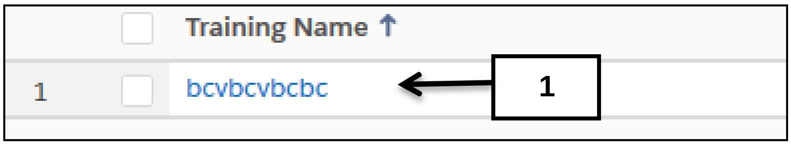
4) Click on Save



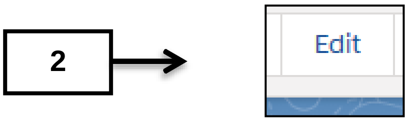
The training session has now been cancelled and will trigger a post to chatter to notify user of the training session being cancelled.

Completing a Training Session

1) Select the training Session you wish to Complete

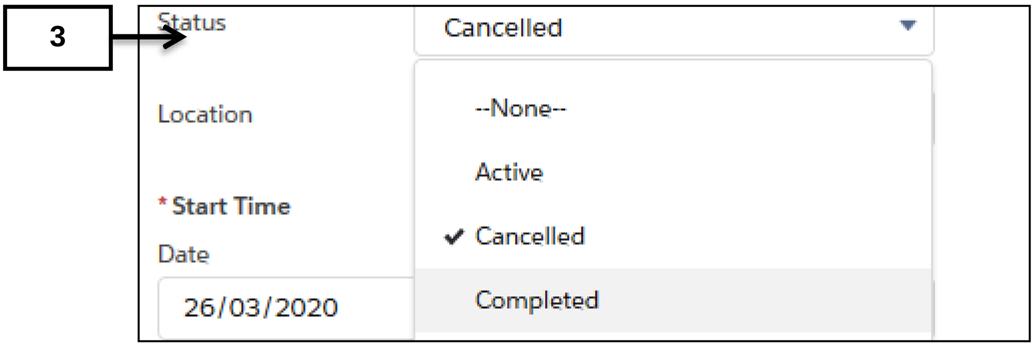


2) Click on the Edit Button or Pencil Icon next to the Status Field

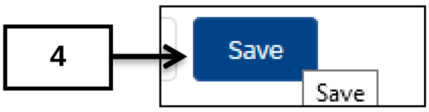


Or

3) Select Completed from the Status field

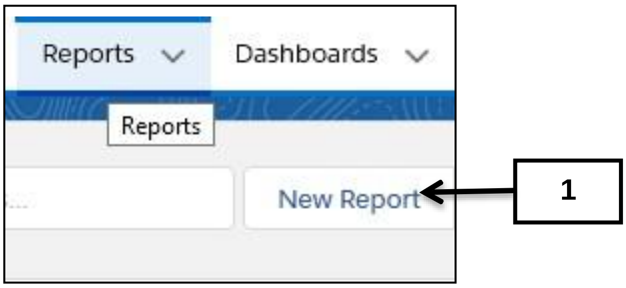


4) Click on Save

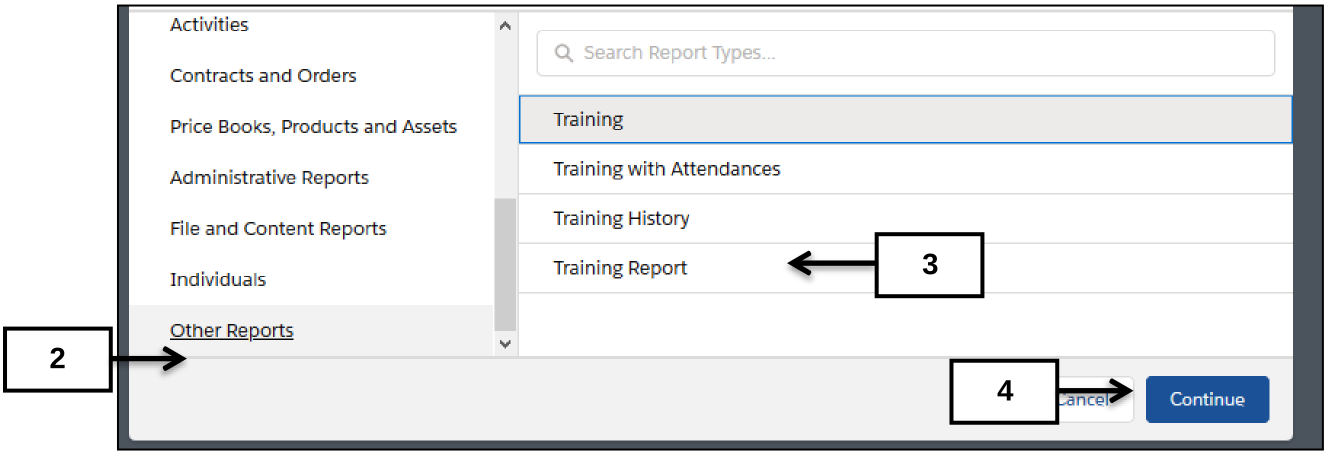


Reports

To select a report relating to training



1) Click on the Report Tab and the New Report button



2) Open the Other Reports folder

3) Select the Training Report

4) Click on the Continue button

You can modify the training reports based on your own requirements.

Tips for Running Reports

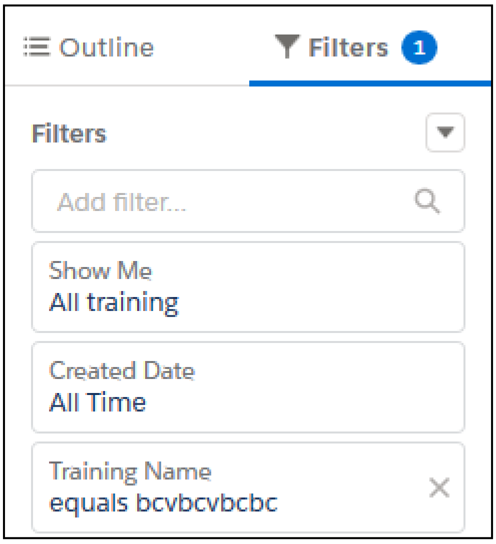
Here are few starter tips when running the reports for training sessions:

Training Report

1) To create an attendance list for a particular training session:

Click on the Filters tab and select the following criteria:

- Show Me: All training
- Created Date : All time
- Training Name equals {Insert Training Name}

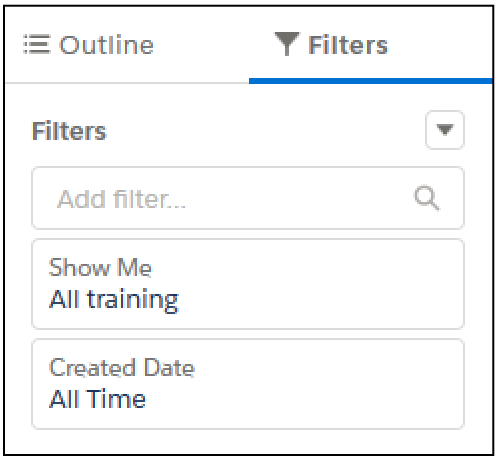


You can add additional fields to the report where necessary e.g. attendance id

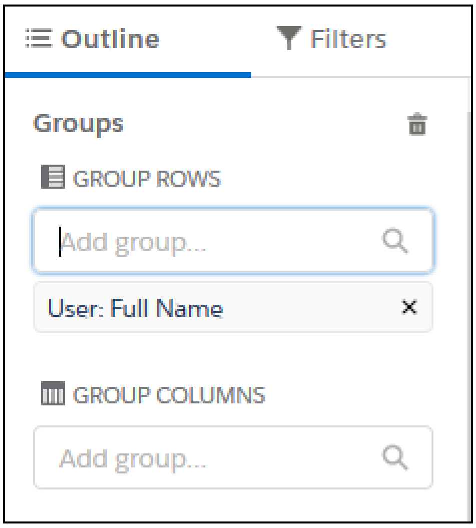
2) To create a report showing all the training sessions a user has attended:

Click on the Filters tab and select the following criteria:

- Show Me: All training
- Created Date : All time



Click on the Outline Tab



Select User: Full Name in the Group Rows drop down menu

Contact Details

If you wish to contact the Salesforce Administrator who created the application, please use the following contact details:

Email: enigtrax@hotmail.com