



Trainodize Booking System User Manual

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Overview

This document is a user manual in the use of the Trainodize Training Booking System.

This document will cover:

- How to Create and Update login details.
- How to book a place on a training course.
- How to update the training status of a training course.
- How a user can view their training record.

- Click on the flow component on the Lightning page to run the Trainodize Training Booking System.



The User Selection Screen will appear

Trainodize Training Booking System

User Selection Screen

Please select an option.

• Selection

☒ Create Login Details

☐ Login to Trainodize

☐ Edit Login Details

☐ Forgotten Password

☐ Exit

Next

Create Login Details

The first task a user needs to do is create their Trainodize Login Details

- Select the Create Login Details option

Trainodize Training Booking System

User Selection Screen

Please select an option.

*Selection

- ☒ Create Login Details
- ☐ Login to Trainodize
- ☐ Edit Login Details
- ☐ Forgotten Password
- ☐ Exit

Next

- Click Next

The Create login Details screen will appear

Create Login Details

Please create your login details

*Salesforce Username ⓘ

chatty@outlook.com

*Password ⓘ

*Confirm Password ⓘ

*Pass Phrase ⓘ

RedWindow41GreenWindow

Next

Enter the following information:

- Salesforce Username: Your Salesforce Username(the username you use to login to Salesforce)
- Password: Enter a password. A valid password consists of:

Minimum of 8 characters

The password must contain:

Upper case letters - [A-Z]

Lower case letter - [a-z]

Numbers - [0-9]

Contain a following special characters [+,*!,+^,@,&,\$,£,(,),<,>,#,\$,%]

- Confirm Password: Renter exactly what was entered in the password field.
- Passphrase Enter a passphrase A valid passphrase consists of:

Minimum of 15 characters

Contain a Upper case letters - [A-Z]

Contain a Lower case letter - [a-z]

Contain a Number - [0-9]

Examples of Passphrases

BlueSkyRedSea41BlackNight

Salesforce4orEvermore

6Down7Up8Right9Left

- When you have entered your details correctly the Login Details Created Notification screen will appear to confirm you have successfully created you login details.

Notes:

- If any errors occur this will cause validation errors to be activated. These must be resolved before you can continue.
- If your Salesforce username is not valid this will cause an error screen to appear. Click on next on the error screen and select the Create login Details option again and reenter your details Salesforce username correctly.
- If your password or passphrase is not unique this will cause an error screen to appear. Click on next on the error screen and select the Create login Details option again and reenter your details.
- If there is an unexpected error this will cause an error screen to appear. Click on next on the error screen and select the Create login Details option again and reenter your details.

Details a user entered previously will be saved.

- If you have already created your login details you cannot create them for a second time

Update Login Details

To edit your login details:

- Select Edit login Details from the User Selection Menu

Trainodize Training Booking System

[User Selection Screen](#)

Please select an option.

* Selection

- ☐ Create Login Details
- ☐ Login to Trainodize
- ☒ Edit Login Details
- ☐ Forgotten Password
- ☐ Exit

[Next](#)

- Click Next

The login screen will appear

[Login Screen](#)

Please enter you login details:

* Salesforce Username ⓘ

* Password ⓘ

[Next](#)

- Enter your Salesforce Username
- Enter your password

If you have entered you details correctly the Edit Login Details page will appear:

Trainodize Training Booking System

[Edit Login Details](#)

Please edit your login details

* Password ⓘ

* Confirm Updated Password ⓘ

* Pass Phrase ⓘ

[Next](#)

Change your login details:

- Password: Enter a password. A valid password consists of:

Minimum of 8 characters

The password must contain:

Upper case letters - [A-Z]

Lower case letter - [a-z]

Numbers - [0-9]

Contain a following special characters [+,*!,+^,@,&,\$,£,(,),<,>,#,\$,%]

Cannot be the same as your current password

- Confirm Password: Renter exactly what was entered in the password field.

- Passphrase Enter a passphrase. A valid passphrase consists of:

Minimum of 15 characters

Contain a Upper case letters - [A-Z]

Contain a Lower case letter - [a-z]

Contain a Number - [0-9]

Cannot be the same as your current Passphrase

Examples of Passphrases

BlueSkyRedSea41BlackNight

Salesforce4orEvermore

6Down7Up8Right9Left

If you have successfully changed your login details the Login Details have been Updated notification screen will appear

Trainodize Training Booking System	
Login Details have been Updated Notification	
Your login details have been updated	
Next	

Note:

Any errors will cause validation rules to be activated which will need to be addressed before you can change you login details.

An error screen will notify you of any errors that will need to be resolved.

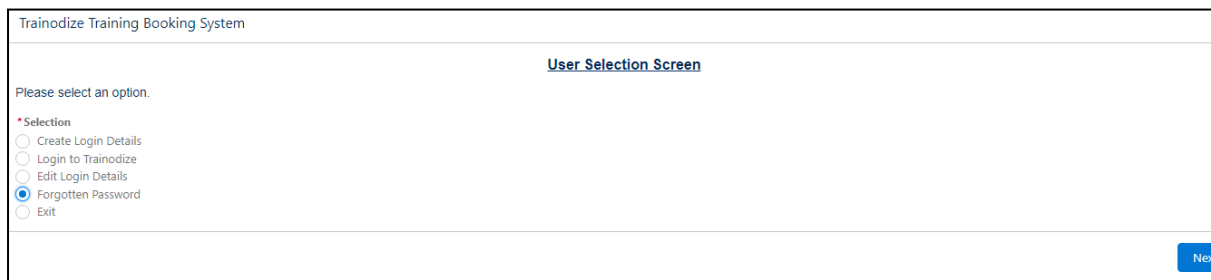
Click on the Next button on the error screen to be taken back the User Selection Menu and select Edit Login Details and re-enter your credentials.

Details a user entered previously will be saved.

Forgotten Password

To retrieve a forgotten password:

- Go to the User Selection Screen.
- Select the Forgotten Password Option



Trainodize Training Booking System

[User Selection Screen](#)

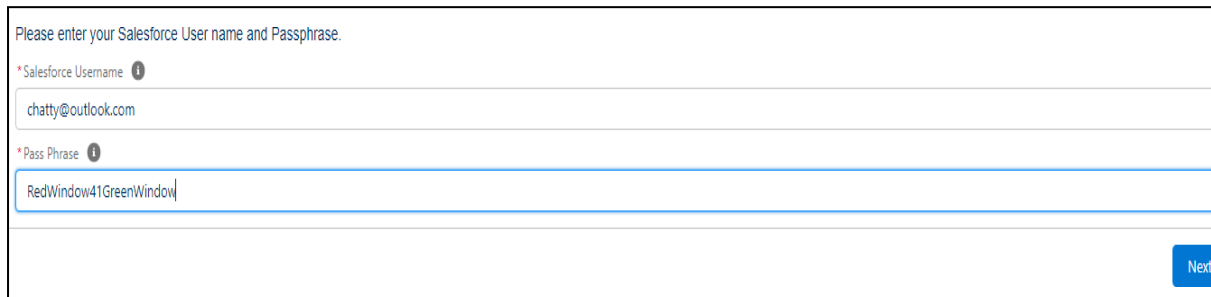
Please select an option.

* Selection

- ☐ Create Login Details
- ☐ Login to Trainodize
- ☐ Edit Login Details
- ☒ Forgotten Password
- ☐ Exit

Next

- Click Next



Please enter your Salesforce User name and Passphrase.

* Salesforce Username ⓘ

chatty@outlook.com

* Pass Phrase ⓘ

RedWindow41GreenWindow

Next

- Enter your Salesforce Username.
- Enter your Passphrase

If you have entered you details correctly the forgotten password email notification screen will appear.

Trainodize Training Booking System	
Forgotten password email Notification	
An email has been sent to you containing your Trainodize password details.	
	Next

An email will be sent to your inbox with your Trainodize password details.

- Click on Next to be taken back to the main menu

Application Exit

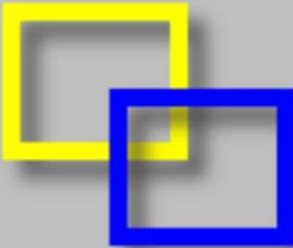
To exit the application:

- Select the Exit option from the User Selection Screen

Trainodize Training Booking System	
User Selection Screen	
Please select an option:	
*Selection	
☐ Create Login Details ☐ Login to Trainodize ☐ Edit Login Details ☐ Forgotten Password ☒ Exit	
	Next

- Click Next

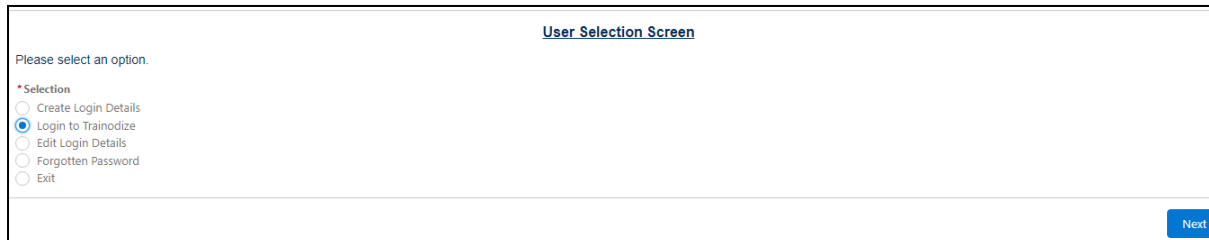
This will take you to the Trainodize main logo screen

 Trainodize Training Management Application	
	Next

Login to Trainodize

To login to the Trainodize application:

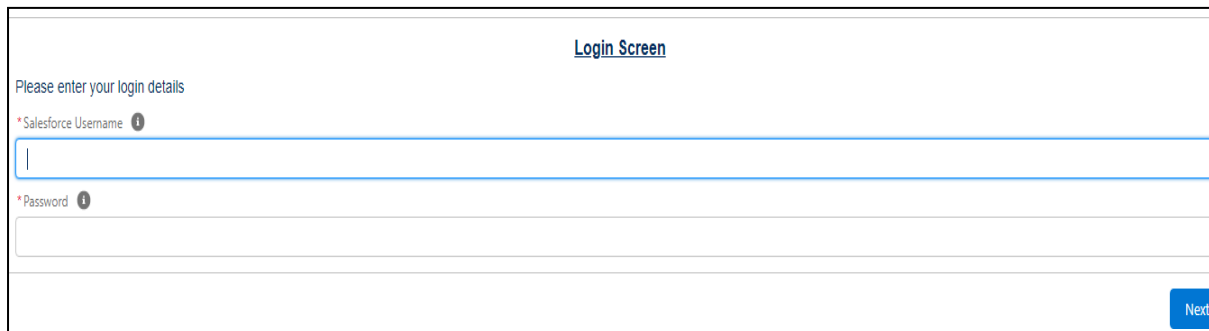
- Select the login to Trainodize option on the User Selection Screen



The screenshot shows the 'User Selection Screen' with the title 'Please select an option.' and a list of options under the heading '*Selection'. The options are: 'Create Login Details', 'Login to Trainodize' (which is selected with a blue radio button), 'Edit Login Details', 'Forgotten Password', and 'Exit'. A blue 'Next' button is located in the bottom right corner.

- Click Next

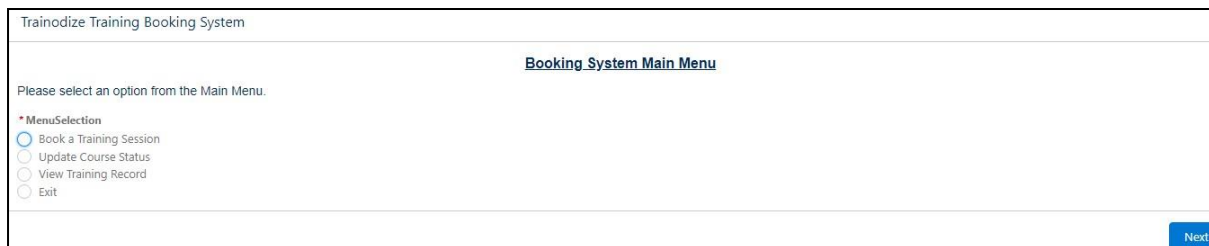
The Trainodize login screen will appear



The screenshot shows the 'Login Screen' with the title 'Please enter your login details'. It contains two input fields: '*Salesforce Username' and '*Password', both with information icons to their right. A blue 'Next' button is located in the bottom right corner.

- Enter your Salesforce Username
- Enter your password

If you have successfully entered you login details the main booking system menu will appear



The screenshot shows the 'Booking System Main Menu' with the title 'Please select an option from the Main Menu.' and a list of options under the heading '* MenuSelection'. The options are: 'Book a Training Session' (which is selected with a blue radio button), 'Update Course Status', 'View Training Record', and 'Exit'. A blue 'Next' button is located in the bottom right corner.

Note

If you have not entered your details correctly a login error screen will appear.

Click Next and select login to Trainodize from the User Selection Menu and reenter your details (These will have been saved from your previous attempt.

Book a Training Course

To book a place on a training course

- Select book a Training Session on the Booking System main Menu

The screenshot shows the 'Trainodize Training Booking System' interface. At the top, it says 'Booking System Main Menu'. Below this, it prompts the user to 'Please select an option from the Main Menu.' There is a section titled '* MenuSelection' with four radio button options: 'Book a Training Session' (which is selected), 'Update Course Status', 'View Training Record', and 'Exit'. A blue 'Next' button is located in the bottom right corner.

- Click Next

A menu of all Active training courses will appear.

The screenshot shows the 'Trainodize Training Booking System' interface. At the top, it says 'Training Booking Menu'. Below this, it prompts the user to 'Please select a training session to book a place on.' There is a section titled '* Active Training Sessions' with four radio button options: 'classroomfullybooked', 'classroomnoonebooked', 'webnobooked' (which is selected), and 'testevent'. At the bottom right, there are two buttons: 'Previous' and 'Next'.

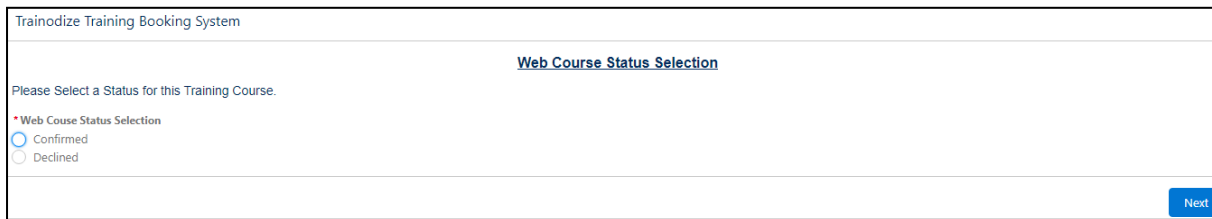
Note:

- If there are no active training courses a screen will notify the user of this scenario.
- A user cannot book 2 places on the same course. The user will be notified of this if this scenario tries to happen.

- Select the training course you wish to book a place on
- Click Next

Web Training Course

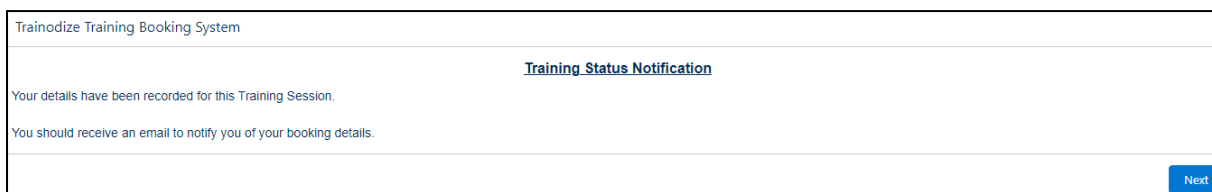
If you are booking a place on a web training course the Web course status Selection screen will appear



The screenshot shows a web form titled "Trainodize Training Booking System". Below the title is a link "Web Course Status Selection". The main text says "Please Select a Status for this Training Course." followed by a red asterisk and "Web Course Status Selection". There are two radio button options: "Confirmed" (which is selected) and "Declined". A blue "Next" button is located at the bottom right of the form.

- Select your status for the Training course
- Click Next

When you have booked a place on a training course the Training status notification screen will appear and an email will be sent to you notifying you of your booking status for the course you have selected.



The screenshot shows a web form titled "Trainodize Training Booking System". Below the title is a link "Training Status Notification". The main text says "Your details have been recorded for this Training Session." and "You should receive an email to notify you of your booking details." A blue "Next" button is located at the bottom right of the form.

- Click Next to be taken back to the Booking System Main Menu

Classroom Training Course

If you are booking a place on a classroom training course the Classroom course status Selection screen will appear

- Select your status for the Training course
- Click Next

When you have booked a place on a training course the Training status notification screen will appear and an email will be sent to you notifying you of your booking status for the course you have selected.

- Click Next to be taken back to the booking System Main Menu

No Places Available on classroom training course

It may occur that when booking a classroom training course that there are no more spaces on the course.

If this happens you will have a choice to join the waiting list so should a space become available you may be automatically added to the course should a space become free.

If the Waiting list course Selection Status screen appears:

Select which option you would like in regard to being added to the waiting list for the training course

No: This will take you back to the Booking System Main Menu

Yes: The following screen will appear

Trainodize Training Booking System	
Training Status Notification	
Your details have been recorded for this Training Session.	
You should receive an email to notify you of your booking details.	
Next	

- Click Next to be taken back to the booking System Main Menu

Update a Training Course

To update a training status on a training course:

- Select Update Course Status from the Booking System main Menu

Trainodize Training Booking System	
Booking System Main Menu	
Please select an option from the Main Menu.	
* MenuSelection	
☐ Book a Training Session ☒ Update Course Status ☐ View Training Record ☐ Exit	
Next	

- Click Next

A menu of all Active training courses will appear.

Note:

- If there are no active training courses to update a status for a screen will notify the user of this scenario.
- A user cannot update a place on a course if they do not already have a place on that course. The user will be notified of this if this scenario tries to happen.

Trainodize Training Booking System	
Training Booking Menu	
Please select a training session to book a place on.	
* Active Training Sessions	
☐ classroomfullybooked ☐ classroomnoonebooked ☒ webnobooked ☐ testevent	
Previous	Next

- Select a Training course to update user course status.

- Click Next

The current status for the training course whether it is for a web or classroom training session will be prefilled by default

- Change your status for the chosen training course.

If you have successfully changed your details the training status notification screen will appear

- Click Next to be taken back to the Booking System Main Menu

Note:

- If a user selects the same course status this will not be updated. A screen will notify the user that this has occurred.
- You cannot book a classroom training course while updating a course status if there are no training places available on the course. e.g. selecting 'Confirmed' if your status was previously 'Declined, or 'Waiting List' and the number of training places available is 0. A screen will notify the user that this has occurred.

View User Training Record

For a user to view their training record:

- Select the View Training record option from the Booking System Main Menu

- Click Next
- The user training record will appear:

- Click Next to be taken back to the Main booking System screen.

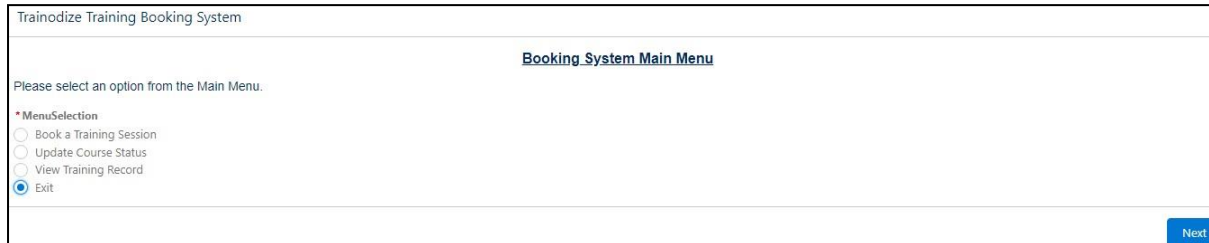
Note:

If the user does not have any training records a notification screen will appear notifying the user of this situation.

Exit

To exit the Trainodize application:

- Select Exit from the Booking System Main Menu



Trainodize Training Booking System

[Booking System Main Menu](#)

Please select an option from the Main Menu.

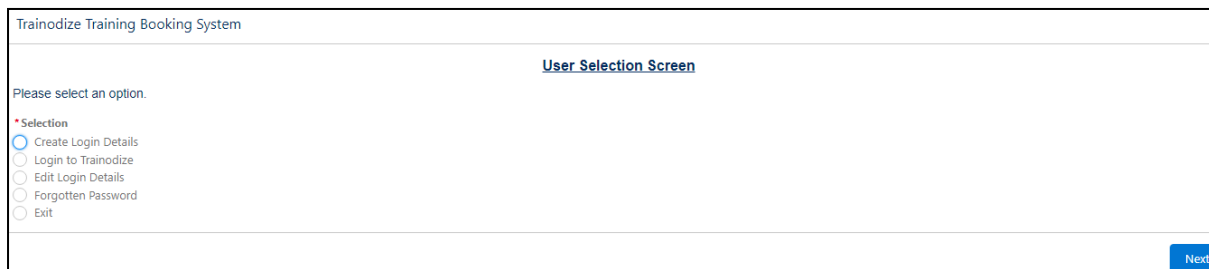
* MenuSelection

- ☐ Book a Training Session
- ☐ Update Course Status
- ☐ View Training Record
- ☒ Exit

Next

- Click Next

This will take you back to the User Selection menu.



Trainodize Training Booking System

[User Selection Screen](#)

Please select an option.

* Selection

- ☒ Create Login Details
- ☐ Login to Trainodize
- ☐ Edit Login Details
- ☐ Forgotten Password
- ☐ Exit

Next