



Trane® Design Assist™ : Account Creation and Help

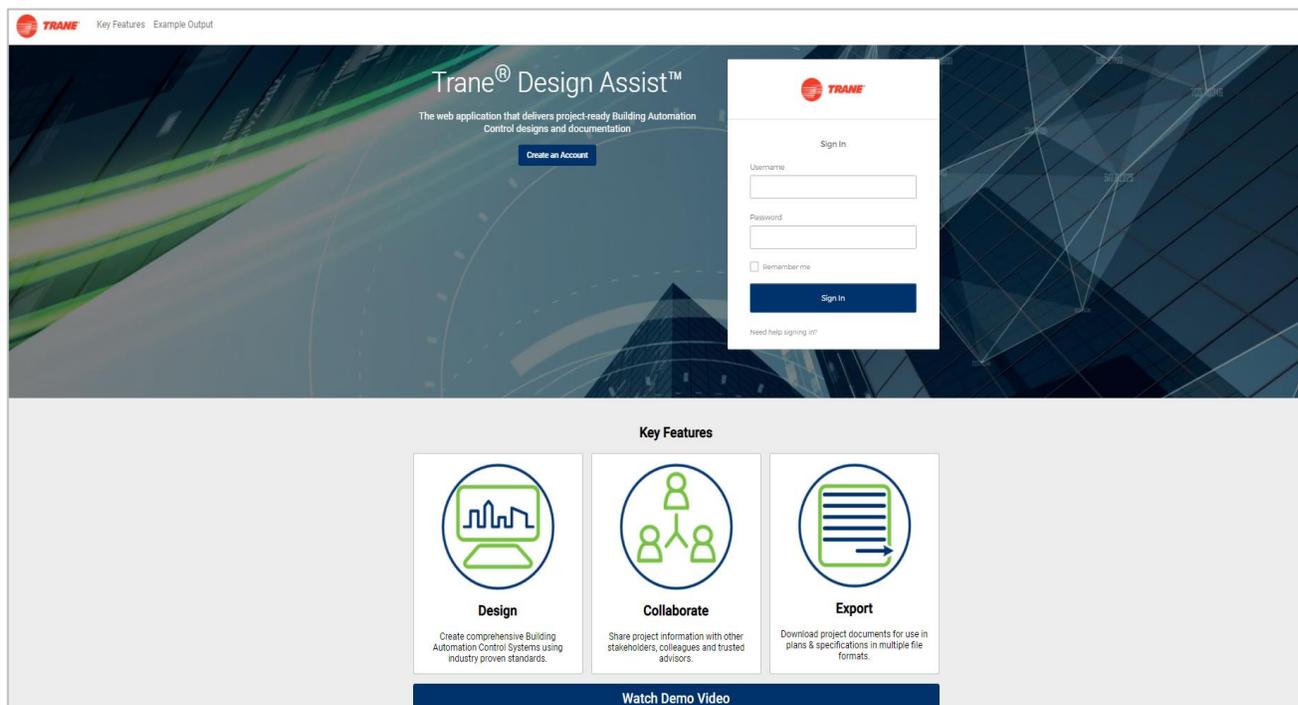
Contents

Trane® Design Assist™ : Account Creation and Help.....	1
Creating an Account:	2
Account Setup:.....	4
Signing into Your Account:	5
Help Signing In:	6
Forgot Password	6

Navigate to Trane® Design Assist™ at <https://tranedesignassist.com>

Recommended Browsers are:

- Chrome
- Safari
- IE (Latest Version)





Creating an Account:

First time users will need to click the blue “Create an Account” button on the home page (shown below). They will then need to enter their credentials and information (shown to the right).



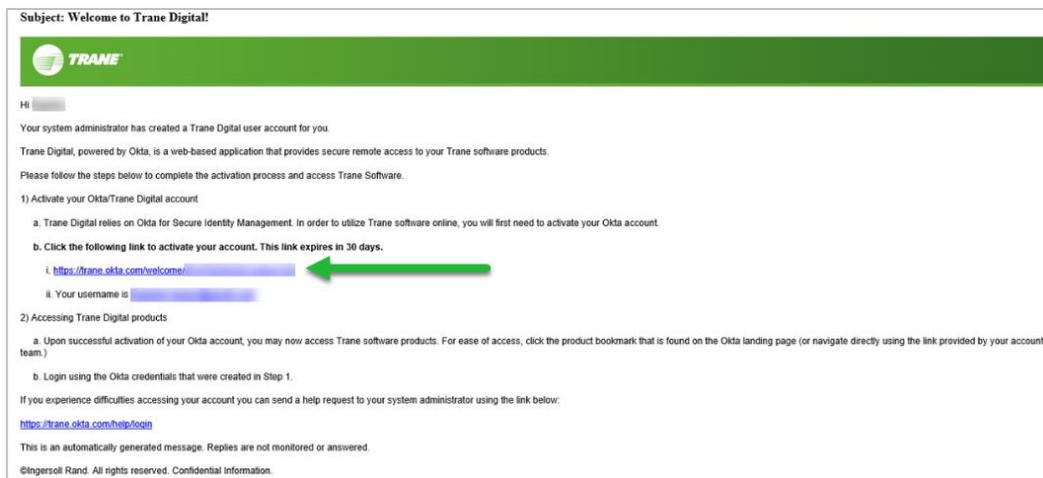
The registration form features the Trane logo at the top. It includes an 'Email *' field with a red asterisk and a red underline, followed by the text 'Email Address Required'. Below this are 'First Name *' and 'Last Name *' fields. At the bottom, there is a grey 'Register' button and a 'Cancel' link.

After entering your email address, first and last name the ‘Register’ button will turn blue, click ‘Register’. After, a popup message will appear thanking the user for registering. Press the ‘OK’ button to continue registration.

The confirmation popup displays the Trane logo and a message: 'Please check your inbox for a confirmation email from OKTA to confirm your account and continue the registration process. Thank you for registering.' Below the message is a blue 'OK' button.

Pressing the OK button will alert OKTA (our account management software) to send the user an email from **OKTA** to confirm the email address previously provided by the user.

An email sent from OKTA, as shown below, will contain a link to activate the account. Click the link provided in the email. This link will expire in 30 days.

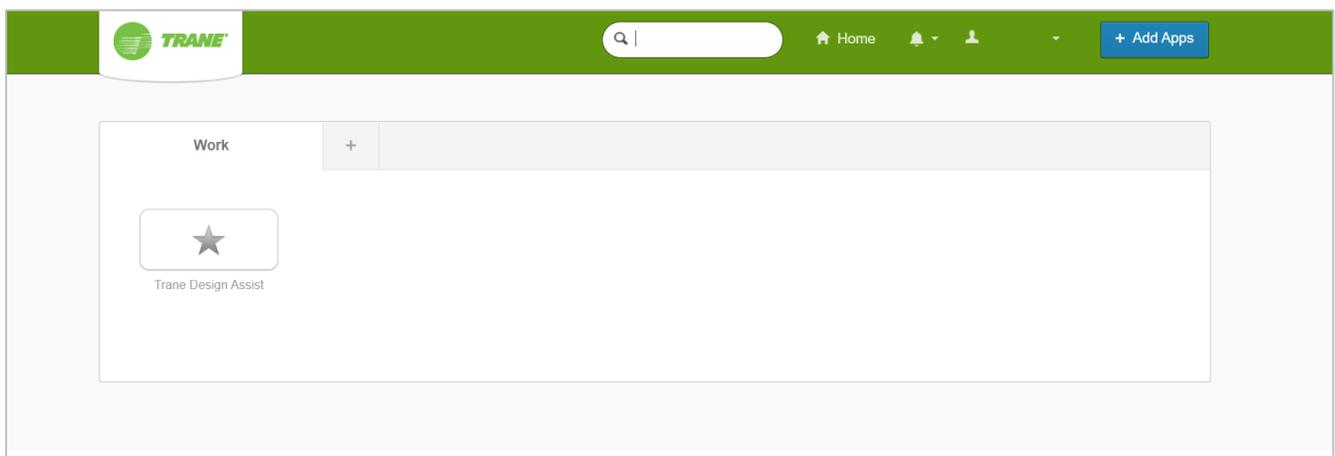




Clicking on the provided link from the OKTA confirmation email will navigate the user to the 'Welcome Center' where the user will need to enter a password, meeting the requirements shown, and select a security image.

After this data has been provided the user should then press the 'Create My Account' button at the bottom of the page.

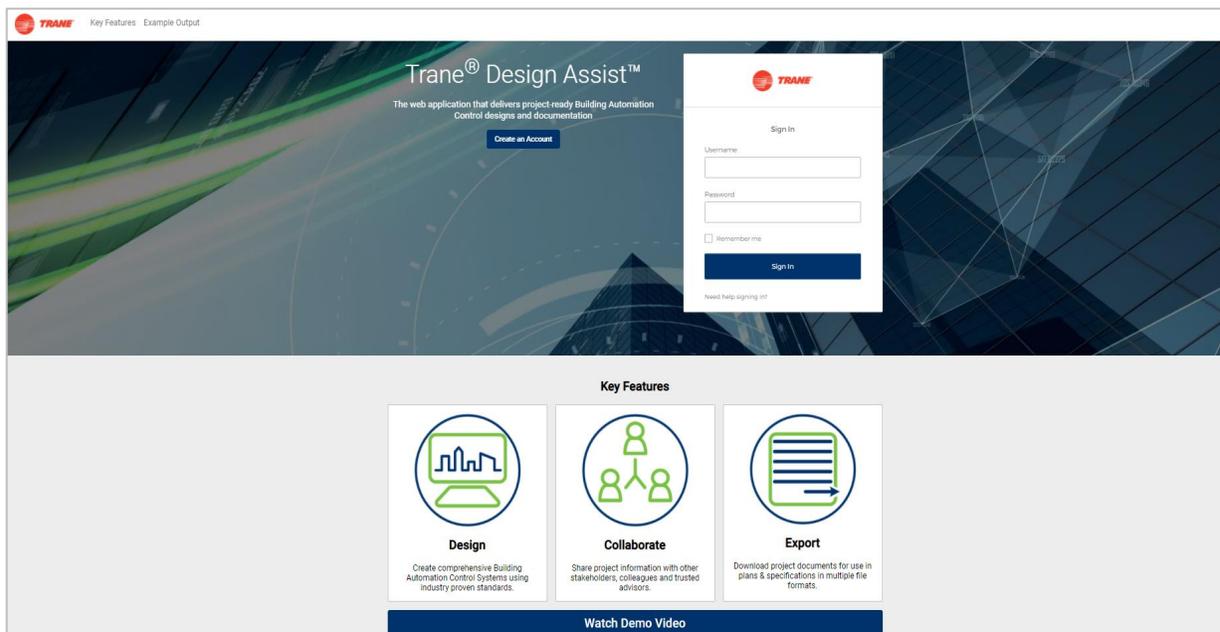
If the user is redirected to this screen and receives the message below, it means that they have successfully registered. To navigate back to the Trane® Design Assist™ landing page, click on the Trane® Design Assist™ star tile.



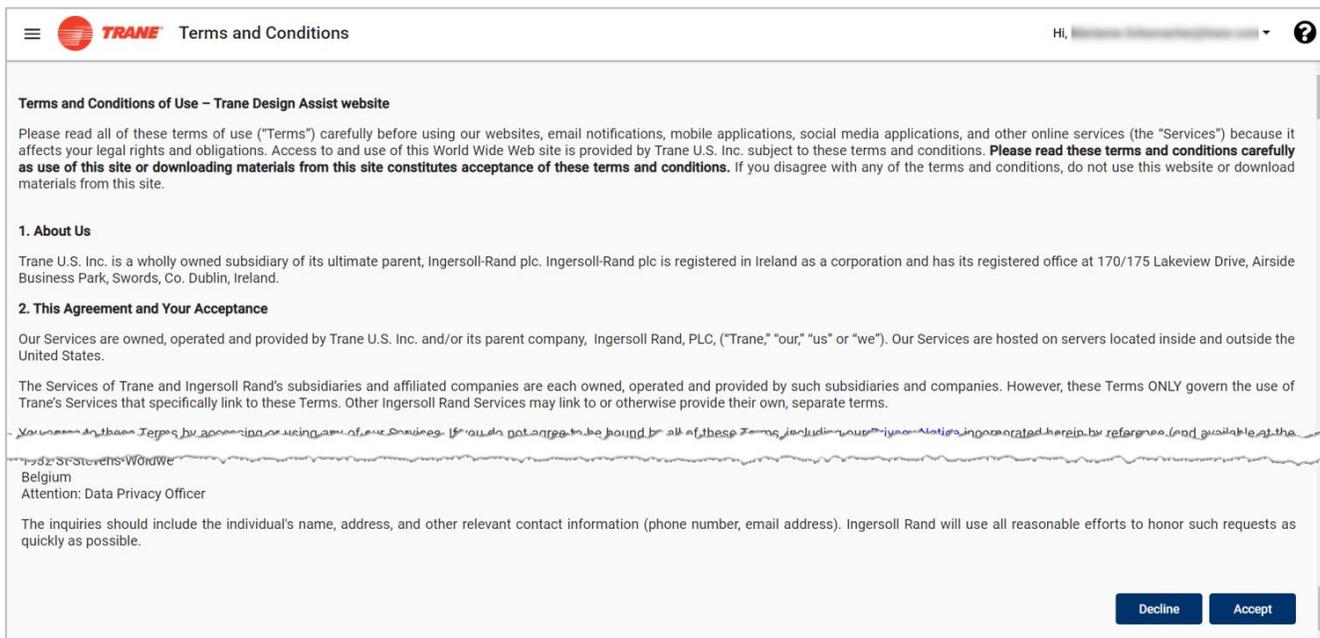


Account Setup:

The user can now sign into Trane® Design Assist™ with their registered email and password they just provided, per the instructions above, on the Trane® Design Assist™ landing page.



When you sign into Trane® Design Assist™ for the first time, the Terms and Conditions will appear. Review the Terms and Conditions Policy and at the bottom of the page, press 'Accept' to accept the Terms and Conditions Policy or otherwise 'Decline'.





Next, users will be asked to provide input for their 'Profile Information'. Please complete all fields.

Profile Information

First Name *
Last Name *
Email Address *
Country *
Postal Code *

Time Zone Preference
Organization *
Role *

"The information you provide below will be used to register your use of the Trane® Design Assist™ site. The information will be used by Trane, Inc., our affiliates, and our service providers for their registration, fulfillment, and administration of the site. Our Privacy Policy governs the use of the information that you provide. By providing the information and selecting the continue button, you indicate that you read, understand and agree with these terms."

Please contact me with Trane® Design Assist™ related material.

CONTINUE

Check the 'Please contact me with Trane® Design Assist™ related material' to stay up to date with the tool.

When all required information is entered, the 'Continue' button on the bottom right will turn blue. Click the 'Continue' button to start using Trane® Design Assist™.

(Note: If you cannot see the 'Continue' button, resize your screen by holding the Ctrl key and zoom out with your mouse wheel.)

Signing into Your Account:

Use the "Sign In" field at the top right of the landing page, to log into your account.

Trane® Design Assist™
The web application that delivers project-ready Building Automation Control designs and documentation

Sign In

Username
Password
 Remember me
Sign In
Need help signing in?

Key Features

Design
Create comprehensive Building Automation Control Systems using industry proven standards.

Collaborate
Share project information with other stakeholders, colleagues and trusted advisors.

Export
Download project documents for use in plans & specifications in multiple file formats.

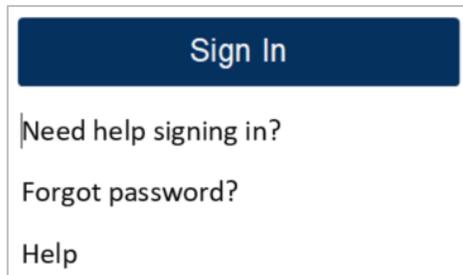
Watch Demo Video



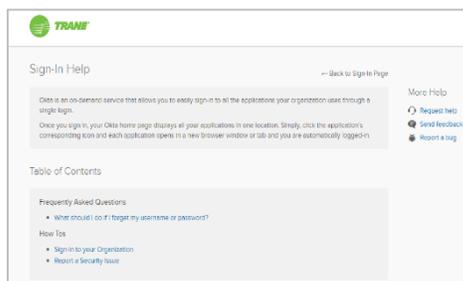
If users forget their password, use the ‘Need help signing in?’ link below the Sign In button to request a password reset.

Help Signing In:

If you need help signing in because you have forgotten your password or you want to reset your password, click the ‘Need help signing in?’ hyperlink. This will open other texts underneath that say, ‘Forgot password?’ and ‘Help’.



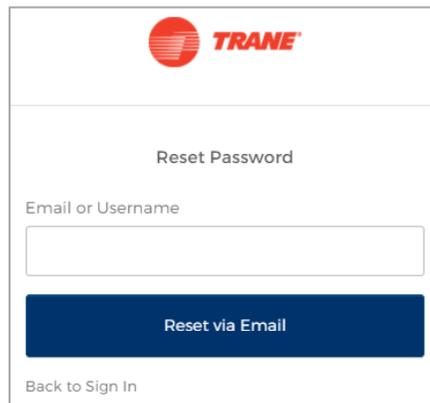
By clicking the “Help” hyperlink, it will bring users to the Trane OKTA webpage in another browser tab to assist with information on frequently asked questions pertaining to accounts.



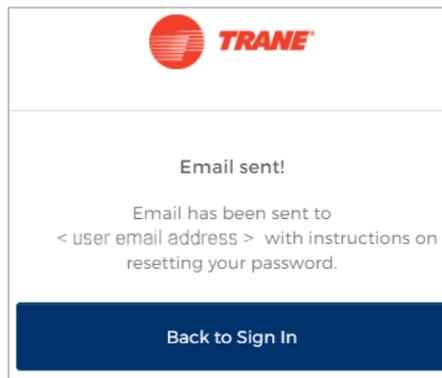
Forgot Password:

If you press the “Forgot password?”, users will need to enter the email address / username of their account and then press the ‘Reset via Email’ button.

If you have inadvertently clicked on ‘Forgot Password’ and did not mean to reset your password, click the “Back to Sign In” hyperlink below this button.

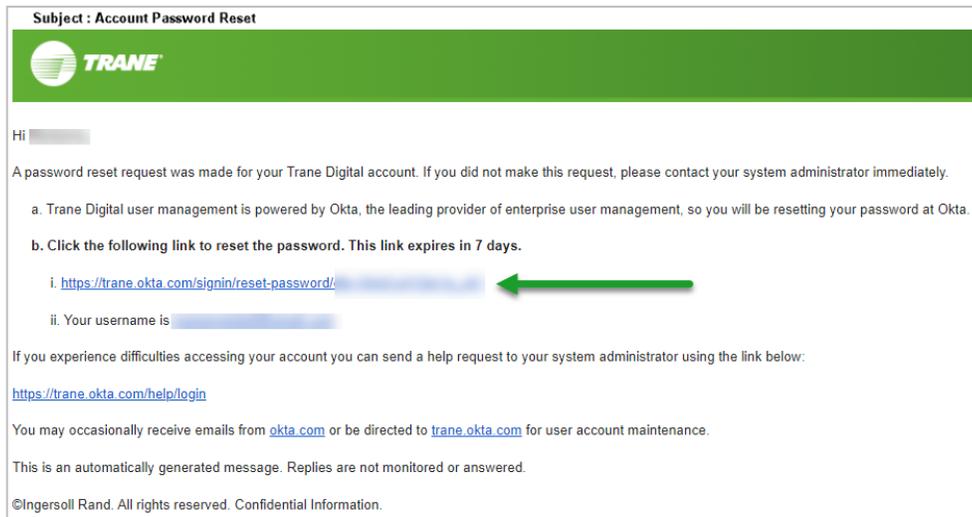


If users typed in their email address / username of the account and clicked the ‘Reset via Email’ button, a notification will appear letting users know to check their email for more instructions on resetting their password.





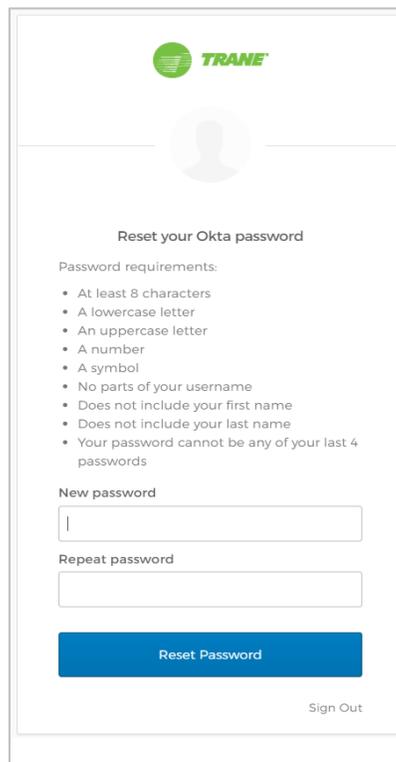
A message from **OKTA** will be sent to the email users provided above and during account setup. The email will contain a link to reset the account password. Click the provided link to reset the Trane® Design Assist™ account password. This link expires in 7 days.



Clicking on the provided link from the OKTA account password reset email will navigate the user to the OKTA reset page where the user will need to enter a new password, meeting the requirements.

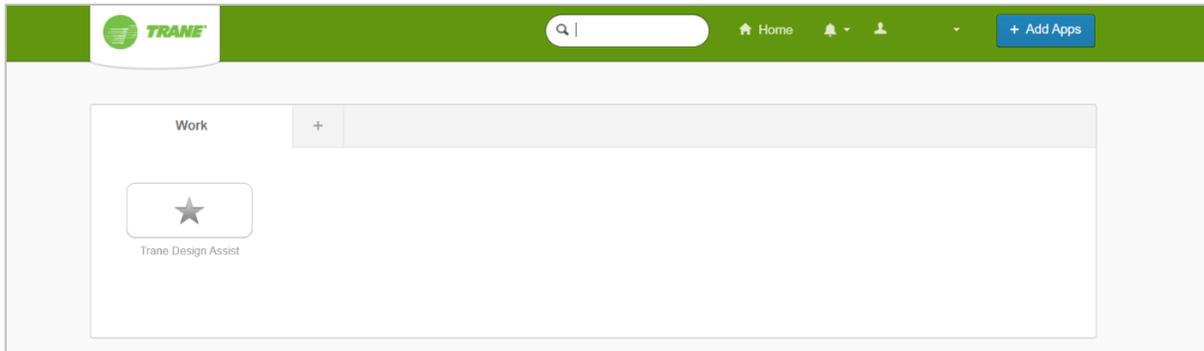
After this new password is entered, the user should then press the 'Reset Password' button at the bottom of the page.

Use this same method if you simply want to change your password for personal security reasons.





If the user is redirected to this screen and receives the message below, it means that they have successfully reset their password. To navigate back to the Trane® Design Assist™ landing page, click on the Trane® Design Assist™ star tile.



The user can now sign into Trane® Design Assist™ with their registered email and newly reset account password they just provided, per the instructions above, on the Trane® Design Assist™ landing page.

