



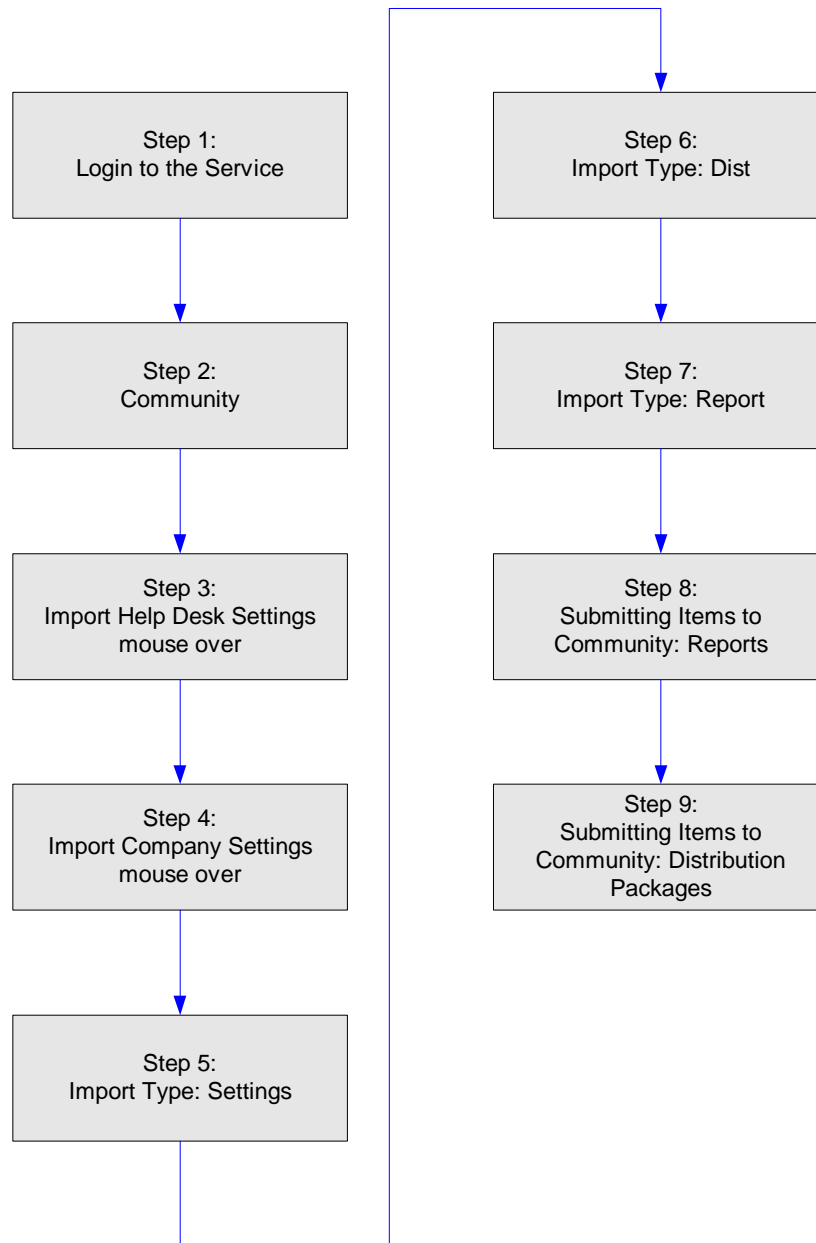
SystemsManagement  
Ondemand™  
by TriActive

Self-paced Training Guide

# TriCommunity

## Community Scenario Workflow

**Objective:** This scenario document is designed to provide a logical workflow that demonstrates all of the features and functionality within the Community. This is not intended to replace the in-depth technical information contained or shown in the Admin and User guides or training videos, but is intended for someone with a technical background to easily navigate through the entire solution at their own pace. Below is the logical workflow diagram and on subsequent pages are more details about each step in the diagram. Depending on your efficiency with Systems Management solutions, this exercise can be completed in approximately 10 minutes.



## Community Scenario Details

- 1 Login to the Service
  - a Open a browser and login into the *Systems Management On Demand™* Portal.
- 2 Community
  - a Click on the **Community** tab.
  - b Below the **Community** tab, notice there are two heading to mouse over: **Import Help Desk Settings** and **Import Company Settings**
  - c Below the mouse over headings there is a table that contains items of Type: Settings, Dist, and Report
  - d Next to each item in the table is an **Import** button.
- 3 Import Help Desk Settings mouse over
  - a Mouse over **Import Help Desk Settings**.
  - b This feature will allow you to import individual Best Practice configurations.
  - c The individual configurations are: Categories, Priorities, Assignment Rules, Explanations, Resolutions and Workgroups
  - d Clicking on one of the titles will import that particular Best Practice configuration.  
**\*\*Please note that the Help Desk Settings are not yet ready, as we are still in Beta. The settings will be available when we go GA\*\***
- 4 Import Company Settings mouse over  
**\*\*This Feature is for our Partners and should not be used\*\***
- 5 Import Type: Settings
  - a In the table there are two items of Type: settings
  - b Only the Help Desk import should be used, as the Company settings are designed for our Partners use.
  - c Using the **Import Help Desk Settings** located in the table, will allow you to import all of the Best Practice settings whereas the mouse over import help desk settings allows you to pick and choose the Best Practice settings you want to import.
  - d Click the **Import** button and the items listed in the description will be imported into your company.  
**\*\*Please note that the Help Desk Settings are not yet ready, as we are still in Beta. The settings will be available when we go GA\*\***
- 6 Import Type: Dist
  - a Click the **Import** button next to one of the distribution packages.
  - b Enter a version number in the **Version** field.
  - c Click **Save**.
  - d The newly imported package is now located under the Distribution tab.  
**\*\*If you are unable to import distribution packages from the Community, please call your *Systems Management On Demand™* provider and ask them to enable the Software Distribution Solution\*\***

- 7 Import Type: Report
  - a Click the **Import** button next to one of the reports.
  - b Enter a report name in the **Report Name** field.
  - c Select the **Folder** in which to save the report
  - d Click **Save**.
  - e The newly imported package is now located in your Reports Library

\*\*If you are unable to import reports from the Community, please call your **Systems Management On Demand™** provider and ask them to enable the Asset Inventory Professional Solution\*\*
  
- 8 Submitting items to Community: Reports
  - a Click on the **Reports** tab.
  - b Expand the folder in which the report you want to submit is located.
  - c Click the **Export** link next to the report.
  - d Save the .xml file to your local disk drive.
  - e Send an email to your **Systems Management On Demand™** provider with the .xml file attached.
  - f Your provider will test and verify the report and then post it to the Community.
  
- 9 Submitting items to Community: Distribution Packages
  - a Click on the **Distribution** tab.
  - b Click the **Export** button next to the package you want to submit.
  - c Save the .xml file to your local disk drive.
  - d Send an email to your **Systems Management On Demand™** provider with the .xml file attached.
  - e Your provider will test and verify the distribution package and then post it to the Community.