



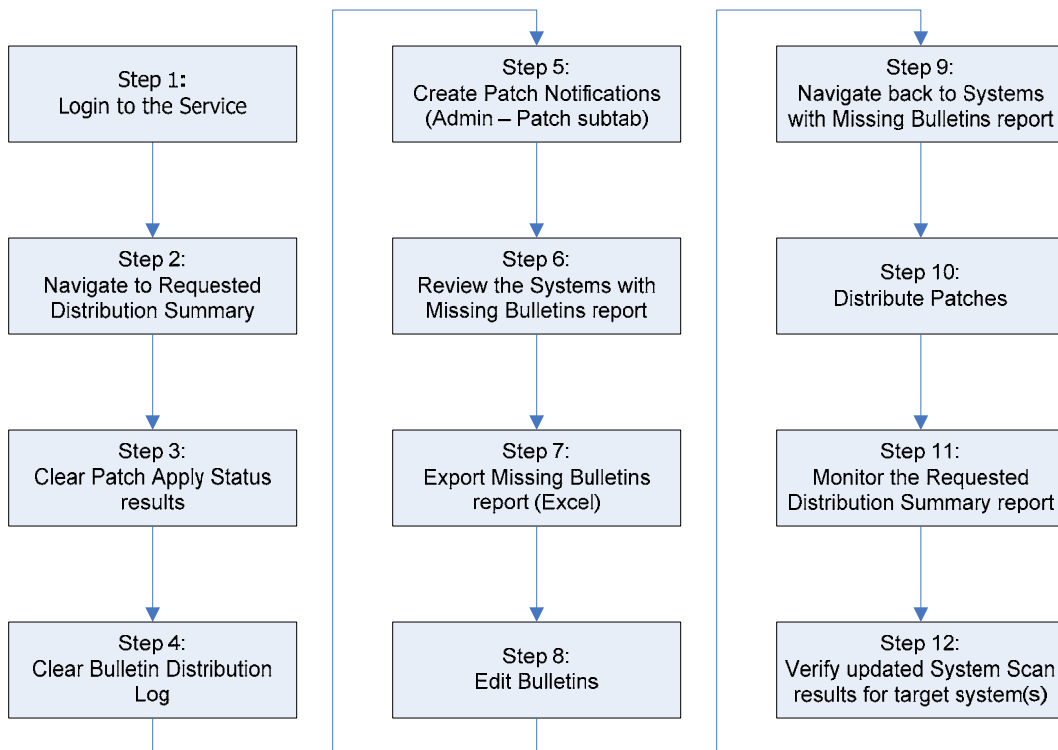
SystemsManagement
Ondemand™
by TriActive

Self-paced Training Guide

Patch Management

TriActive Patch Management Scenario Workflow

Objective: This scenario document is designed to provide a logical workflow that demonstrates all of the features and functionality within the TriActive Patch Management solution. 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 25 minutes.



TriActive Patch Management Scenario Details

- 1 Login to the Service
 - a Open a browser and login into the *Systems Management On Demand™* Portal.
- 2 Patch
 - a Click on **Patch**.
 - b Click on **Distribution** to view the **Requested Distribution Summary**.
- 3 Clear Requested Distribution Summary records
 - a Select the top checkbox to the left of all records.
 - b Click on **Delete**.
- 4 Clear Bulletin Distribution Log
 - a Mouse over **Distribution** menu.
 - b Click on **Bulletin Distribution Log**.
 - c Click on **Clear All Patch Events**.
- 5 Click on **Notifications** to create notifications items
 - a Click **Endpoint** to create notifications for an individual system.
 - b Select a system to from the **Select the entity** dropdown box.
 - c Select the **Send e-mail notification** checkbox.
 - d Select an email address from the **E-mail** scroll box.
 - e Click **Save**.
 - f Find the notification created in the previous steps under Configured Notification Items.
 - g Uncheck the **Disabled** checkbox next to the notification and click **Apply**.
- 6 Review Systems with Missing Bulletins report
 - a Navigate to the **Patch** tab
- 7 Export patch scan results to Excel
 - a Click **View Patches** next to a system name.
 - b Click the Excel icon to export the scan results.
 - c Save the Excel spreadsheet.
 - d Repeat above steps (a-c) for additional systems.
- 8 Click the **Bulletins** sub tab
 - a Select the checkboxes to the left of a few bulletins
 - b Click the **Edit Bulletin** button
 - c View the **Approved** checkbox option to approve the patch.
 - d View the **Auto-apply** checkbox option to auto-apply the patch.
 - e Click **Cancel**.
- 9 Navigate back to the Systems with Missing Bulletins report
 - a Click on the **Patch** tab

TriActive Patch Management Scenario Details

- 10 Distribute Patches
 - a Select system(s) and click **Apply All Patches** button.
 - b Verify warning message for patches NOT approved.
 - c Set Bandwidth throttling and Error sampling options.
 - d Select reboot options.
 - e Click **Approve All/Save** button.

- 11 Monitor the Requested Distribution Summary report
 - a After invoking the patches, the user should be automatically navigated into the Patch Distribution Summary report. Note: To do this manually, click **Distribution** sub tab.
 - i Click **Detail** to view the status for individual systems
 - b Verify that the distribution completed and that the Patch Apply Status View and patch scan results are correct.

- 12 Verify updated Systems with Missing Bulletins report
 - a Click the **Patch** tab.
 - b Verify the scan results of the selected systems have been updated.