

SUMMARY:

ManagedServices
OnDemand™

RELEASE SUMMARY:
TRIACTIVE® PARTNER PORTAL
RELEASE 1.0

NOVEMBER 2007

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TRIACTIVE® PARTNER PORTAL RELEASE 1.0

NOVEMBER 2007

PURPOSE OF THIS DOCUMENT

The purpose of this document is to describe the changes to the TriActive® Partner Portal for the 1.0 Release. The descriptions, screenshots, and examples are included to assist your transition to the new features in the most efficient manner possible.

This document contains the following sections:

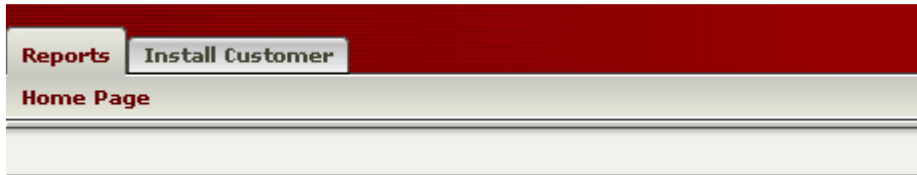
- New Features & Enhancements
 - Redesigned Reports tab
 - Updated Company Summary report
 - New Financial Summary report
 - Updated Edit Contract page
 - Updated Provision a Purchased Solution page
 - Updated Install page
 - Enhanced online documentation
- Known Issues
- Contact Us

Refer to the following sections for details about each topic.

REDESIGNED REPORTS TAB

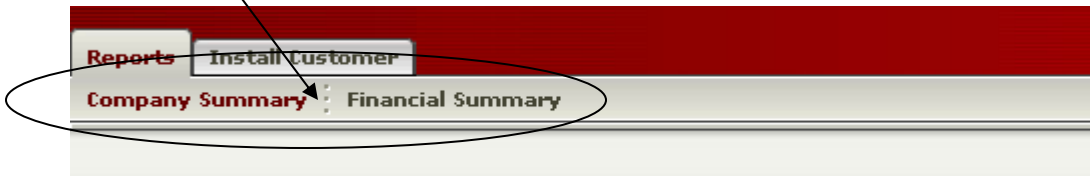
The TriActive Partner Portal Reports tab has been redesigned for the 1.0 Release. This redesign offers more information and better organization.

Original:



You can now access two reports from the **Reports** tab: the **Company Summary** and the **Financial Summary**.

New Release:



Refer to the "Updated Company Summary Report" and the "New Financial Summary Report" sections for details about each report.

UPDATED COMPANY SUMMARY REPORT

The Company Summary report has been redesigned for the 1.0 Release. The information on this report has been streamlined for ease of use.

The company summary title displayed as **Report: Company Summary** in previous versions. In the 1.0 Release, the new title displays as **Company Summary: PartnerName**.

The **Provision Date** column now displays the date only—no longer the time—and the **MEP Total** column has been renamed to **Total # MEPs**.

Promotion Code	Company Name ↑	Company ID	Type	Status	Provision Date	Total # MEPs	Estimated PCs	Discovery Total	# Monitored
9047	Haltek	cps3	Trial	Installed	Jun 6, 2007	0	123	0	0
	Just A Customer	pool000029	Customer	Evaluation	Oct 4, 2007	0	34	0	0
	Lillian	pool000036	Trial	Installed	Oct 9, 2007	0	1	0	0
9047	NetMon Collector Test	pool000002	Customer	Installed	Jun 21, 2007	1	1	0	0
9047	NetMon Collector Test Co.	pool000004	Customer	Installed	Jul 10, 2007	1	2	0	0
9047	NetMon Test Company created August 21	pool000014	Customer		Aug 21, 2007	2	1	0	2
dptest	organization	fcps3	Trial	Installed	Oct 3, 2007	1	500	0	0
9047	Quartz Eval Test 1 TSM-1041	pool000033	Customer	Evaluation Expired	Oct 8, 2007	0	5	0	0
9047	Quartz Eval Test 2 TSM-1041	pool000034	Trial	Evaluation Expired	Oct 8, 2007	0	1000	0	0
9047	Quartz Serialize Testing 1	pool000031	Customer		Oct 5, 2007	0	1	0	0
9047	Quartz testing 3 TSM-1041	pool000035	Trial	Installed	Oct 8, 2007	0	999999999	0	0
007	RTest Company	pool000016	Trial	Installed	Sep 11, 2007	0	1	0	0
9047	rTest2	pool000015	Trial	Installed	Sep 7, 2007	0	1	0	0
	S Test Customer	pool000032	Trial	Installed	Oct 8, 2007	0	23	0	0
9047	test company for install partner code	cps1	Customer		Jun 5, 2007	0	1	0	0
9047	Testing CSC need new company	pool000025	Trial	Installed	Oct 1, 2007	1	1	0	0
9047	Testing Evals and Purchase	pool000028	Trial	Evaluation Expired	Oct 4, 2007	0	1	0	0
9047	Testing Install of Company	cps2	Customer		Jun 5, 2007	0	1	0	0
*self_10-3-2007	Testing the *self promo code 3	pool000026	Trial	Installed	Oct 3, 2007	0	5	0	0
*self_10-3-2007	Testing the *self promo code 4	pool000027	Customer		Oct 3, 2007	0	4	0	0
9023	t7.0 test	pool000018	Customer		Sep 17, 2007	1	1	0	0
9047	TriActive	pool000003	Customer		Jun 25, 2007	1	5	0	0
9050	zvtst2	zvtst2	Trial	Installed	Sep 6, 2007	0	1000	0	0

The **Company ID** column now displays next to the **Company Name** column.

The following columns no longer display on the Company Summary report:

- MEP Minimum
- Monitored Devices Price
- Contract Start Date
- Contract End Date
- MEP Price
- Estimated Monthly Total

You can now find this data on the Financial Summary report, which is illustrated in the following section.

NEW FINANCIAL SUMMARY REPORT

The new Financial Summary report includes all of the financial information for your companies. You will recognize the following columns that used to display on the Company Summary report:

- MEP Minimum—now called Min # MEPs
- Monitored Devices Price—now called Monitored Price
- Contract Start Date—now called Contract Start
- Contract End Date—now called Contract End
- MEP Price
- Estimated Monthly Total—now called Estimated Mo. Total

In addition, the following new columns provide more financial details:

- MEP Price
- Min # Monitored
- Contract Term
- Payment method

Click a company name to display the **Customer 360** report.

Financial Summary: TriActive, Inc.													
Refresh [Navigation icons] 1 to 23 of 23 [Navigation icons]													
Company Name ↑	Company ID	Total # MEPs	Min # MEPs	MEP Price	# Monitored	Min # Monitored	Monitored Price	Estimated Mo. Total	Contract Start	Contract End	Contract Term	Payment Method	
v7 Haltek	cps2	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Just A Customer	pool000029	0	50	\$700.00	0	2	\$10.00	\$35,020.00	Oct 8, 2007	Oct 8, 2008	1 Year	Subscription	
v7 LTest Customer	pool000036	0	21	EUR3.20	0	12	EUR1.23	EUR81.96	Oct 9, 2007	Oct 9, 2010	3 Years	Prepaid	
v7 NetMon Collector Test	pool000002	1	0	\$0.00	0	0	\$0.00	\$0.00					
v7 NetMon Collector Test Co.	pool000004	1	0	\$0.00	0	0	\$0.00	\$0.00					
v7 NetMon Test Company created August 21	pool000014	2	0	\$0.00	2	0	\$0.00	\$0.00					
v7 organization	fcps3	1	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Quartz Eval Test 1 TSM-1041	pool000033	0	10	\$0.00	0	10	\$0.00	\$0.00					
v7 Quartz Eval Test 2 TSM-1041	pool000034	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Quartz Serialize Testing 1	pool000031	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Quartz testing 3 TSM-1041	pool000035	0	123456789	\$0.00	0	123456789	\$0.00	\$0.00					
v7 RTest Company	pool000016	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 rTest2	pool000015	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 STest Customer	pool000032	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 test company for install partner code	cps1	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Testing CSC need new company	pool000025	1	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Testing Evals and Purchase	pool000028	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Testing Install of Company	cps2	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Testing the *self promo code 3	pool000026	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 Testing the *self promo code 4	pool000027	0	0	\$0.00	0	0	\$0.00	\$0.00					
v7 t 7.0 test	pool000018	1	500	GBP1.50	0	0	GBP0.00	GBP750.00	Sep 20, 2007	Sep 20, 2008	1 Year		
v7 Triactive	pool000003	1	0	\$0.00	0	0	\$0.00	\$0.00					
v7 zvtest2	zvtest2	0	0	\$0.00	0	0	\$0.00	\$0.00					

Finally, we have both MEPs and monitored devices into a new formula for calculating the Estimated Monthly Total: (MAX (Min # MEPs, Total # MEPs) * MEP Price) + (MAX (Min # Monitored, Total # Monitored) * Monitored Price).

UPDATED EDIT CONTRACT PAGE

The Edit Contract page has been updated for the 1.0 Release. The new features allow you to customize your contracts with great detail.

This updated Edit Contract page includes the following new fields:

- Payment method (subscription or prepaid)
- Min # of PCs (defaults to 0)
- Minimum # Monitored Devices (defaults to 0)
- Minimum Monthly Total:
The formula for calculating the minimum monthly total is: (Minimum # PCs * Price Per PC) + (Minimum # Monitored Devices * Price Per Monitored Device).

The MEP Minimum has been renamed to Minimum # of PCs (defaults to 0).

The screenshot shows the 'Edit Contract' form with the following fields and annotations:

- Term:** Select a Term (dropdown)
- Payment:** Select a Payment Method (dropdown)
- Start Date:** 10/11/2007 (calendar icon)
- End Date:** 10/11/2008 (calendar icon)
- Currency:** USD (dropdown) - An arrow points to this field with the text: "The **Currency** field is now a drop-down list. In addition, the currency you choose here displays in the price fields on the **Financial Summary**."
- Minimum # PCs:** 0
- Price Per PC:** 0.00 - An arrow points to this field with the text: "The Price field now displays as the **Price Per PC** field."
- Minimum # Monitored Devices:** 0
- Price Per Monitored Device:** 0.00
- Minimum Monthly Total:** 0.0

Specify minimums to be eligible for price band discount

Buttons: Save, Cancel

UPDATED PROVISION A PURCHASED SOLUTION PAGE

The Provision a Purchased Solution page also contains updates in the 1.0 Release. Here again, you can configure the solution in greater detail.

You will find the following new fields on this page:

- Enable Database Extract (refer to the “New Database Extract Feature” Section for details)
- Minimum # PCs (defaults to 0)
- Minimum # Monitored Devices (defaults to 0)

Provision a Purchased Solution: pool000029

1. * Solution To Provision:
Asset Inventory Professional (AIP)
 Enable Education
 Enable Priority Support
 Enable Database Extract
 Enable Customer Service Center

 Assign every specialist to the role associated with the selected solution

2. *Term:
1 Year

3. *Start Date:
10/11/2007

4. *End Date:
10/11/2008

5. Minimum # PCs:
50

6. Minimum # Monitored Devices:
2

Specify minimums to be eligible for price band discount

UPDATED INSTALL PAGE

This release of the TriActive Partner Portal includes an updated Install page. The Promotion Code on this page now displays as a drop-down list, rather than a text field. This list displays all of the promotion codes that belong to the account of a logged in partner.

The screenshot shows the 'Install' page with the following fields and values:

- Promotion Code:** partner (TriActive, Inc.) (highlighted with a circle and an arrow pointing to the text below)
- Contact Information:**
 - First Name: Jane
 - Last Name: Doe
 - Phone Number: 512-691-9000
 - Zip Code: 78759
 - Email: jdoe@triacrive.com
 - Confirm Email: jdoe@triacrive.com
- Company Information:**
 - Company Name: Company ABC
 - Estimated number of endpoints: 25
 - Number of locations: 2
- Portal Login:**
 - Company Login: (cannot contain spaces) companyabc
 - Username: userabc
 - Password: *****
 - Confirm Password: *****

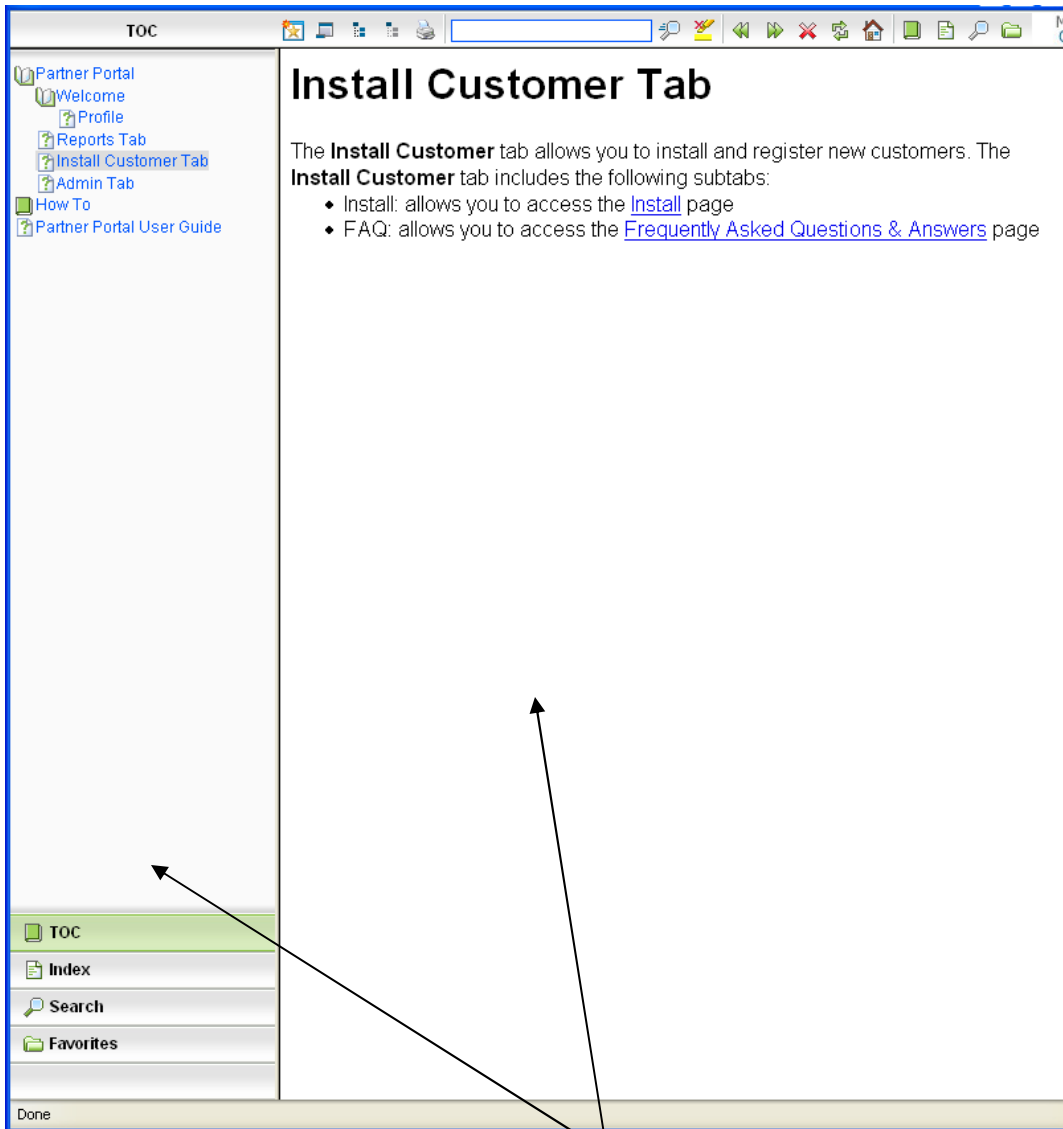
Buttons: Save, Reset, Cancel (at the top and bottom of the form).

Select a promotion code from the drop-down list.

ENHANCED ONLINE DOCUMENTATION

The TriActive Partner Portal has been updated and enhanced for the 1.0 Release. This new documentation provides all of the TriActive Partner Portal information in one, easy-to-navigate location.

Click the Help link anywhere in the portal to display the new online documentation.



The enhanced online documentation provides a two-pane window with navigation on the left and content on the right. You can use the new navigation functions, including the TOC, Index, and Search tabs, to locate the information you need quickly.

KNOWN ISSUES

The following list identifies the known issues for the 1.0 Release of the TriActive Partner Portal:

- When you sort by Status in the Company Summary report, the Eval and Eval-expired are not grouped properly. (bug 4305)

CONTACT US

We would like to hear from you. If you have any questions or comments about this release, you can contact us at support@triacrive.com or call 1-877-874-2284, option 3.