

Traction Thrive Critical Care Resource Management

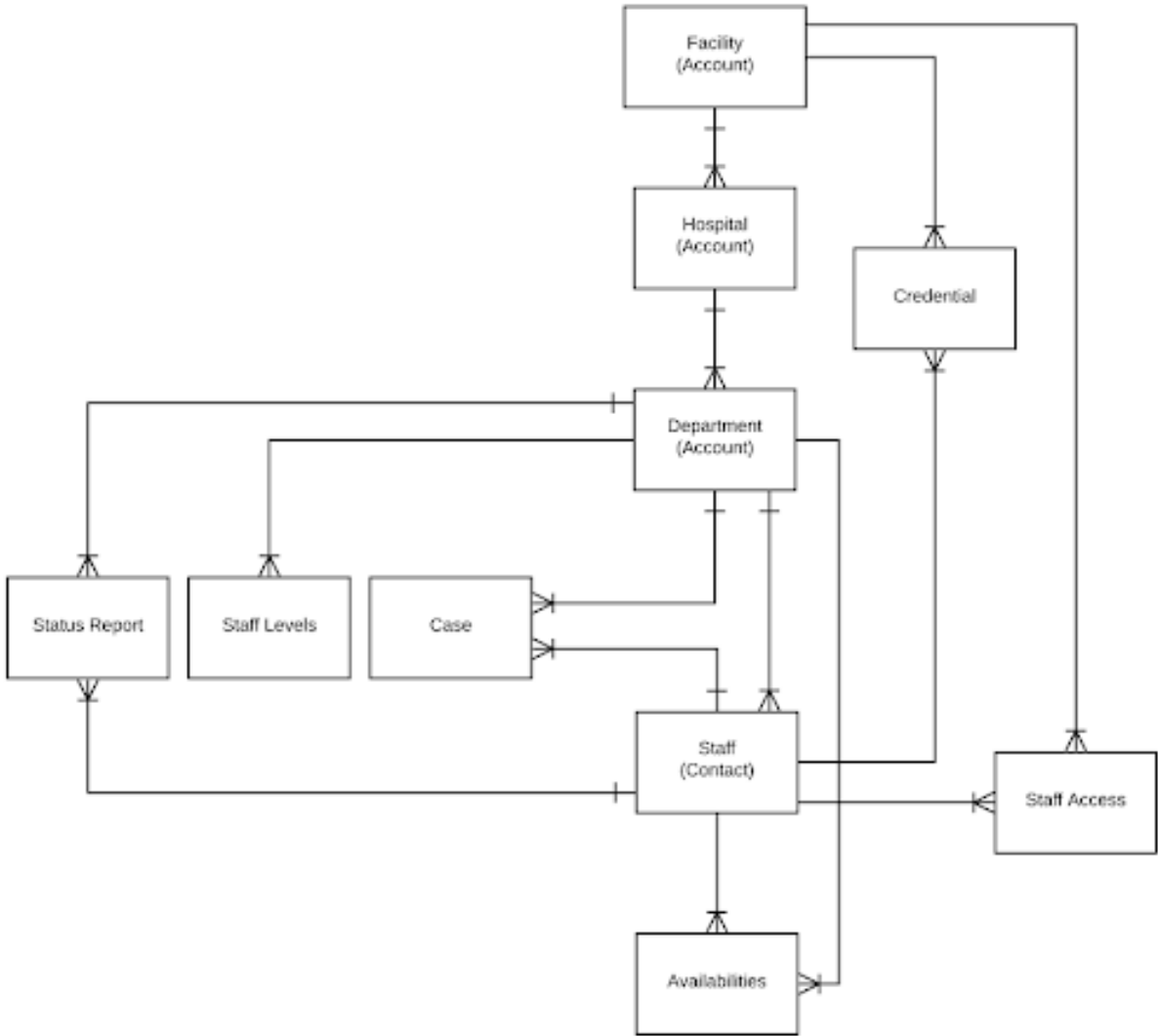


Package Installation Guide

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Data Model



Object Overview

Traction Thrive Critical Care Resource Management System includes the following objects:

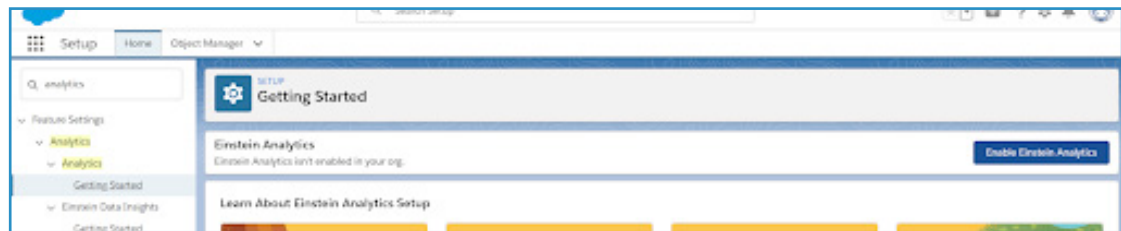
Component Type	Name	API Name	Details
Custom Object	Availability	Assignment__c	Availability keeps track of staff availability and allow users to assign staff to Departments
Custom Object	Credential	Credential__c	Used to track the Registrant type for a Staff for an associated Facility, to be aggregated within the Dashboard pages
Custom Object	Staff Access	Staff_Access__c	Junction object between Account and Contact, allowing a staff member to be assigned to multiple departments and access their Status report data
Custom Object	Staff Levels	Staff_Levels__c	Staff Levels are used to set the staff levels required to meet Essential services needs and Full services needs. The Essential and Full levels are used to define the thresholds in the dashboards to determine staffing needs
Custom Object	Staff Reports	Status_Report__c	Capture inventory for a given Department and patient details. New inventory items or pattern statuses can be added and tracked depending on the need of the Department

Package Installation

Traction Thrive Installation Process

Pre Installation Steps

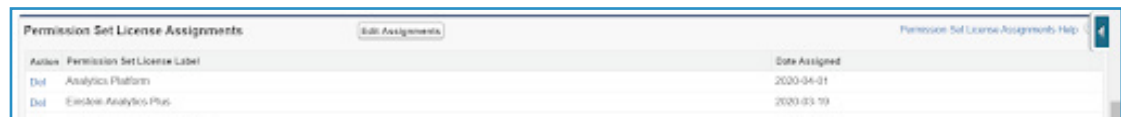
Enable Einstein Analytics. (may be able to be done installer) Open Setup > Feature Settings > Analytics > Analytics > Getting Started. Select "Enable Einstein Analytics"



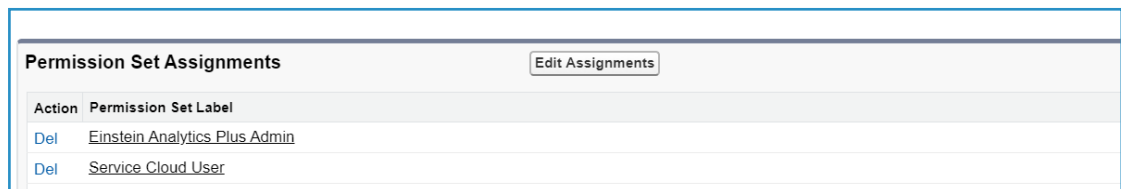
Admin User Settings:

Add Einstein Analytics Permission Set License and Permission Set

1. Setup > User > Select Admin User that will install the package
2. Add Permission Set License - Einstein Analytics Plus:



3. Add Permission Set - Einstein Analytics Plus Admin:



Select "Knowledge User" on user record.

Set OWD Sharing Settings for Opportunity and Case to Private (Setup > Sharing Settings)

Delete the content asset = Background.asset from Asset Files (if applicable) > Setup > Asset Files > If "Background.asset" exists, delete it

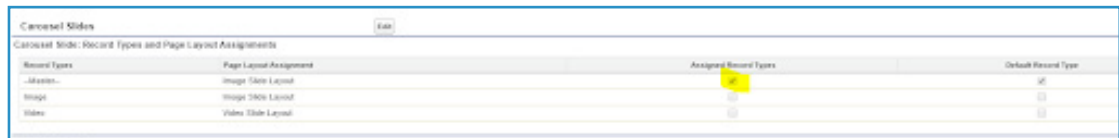


Package Installation

Check to ensure Knowledge, Topics for Objects and Omni-Channel are enabled in the Org > Setup > Knowledge Settings

Setup > Feature Settings > Service > Omni-Channel > Omni-Channel Settings
In Classic, Setup > Search: Topics for Objects
Enable for Knowledge

For Analytics Cloud Integration User and System Admin Profiles: Object Settings > Contact > Edit > Set Default Record Type to "Master"



Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
Master	Image Slide Layout	☒	MC
Image	Image Slide Layout	☐	MC
Video	Video Slide Layout	☐	MC

Repeat for Object: Knowledge

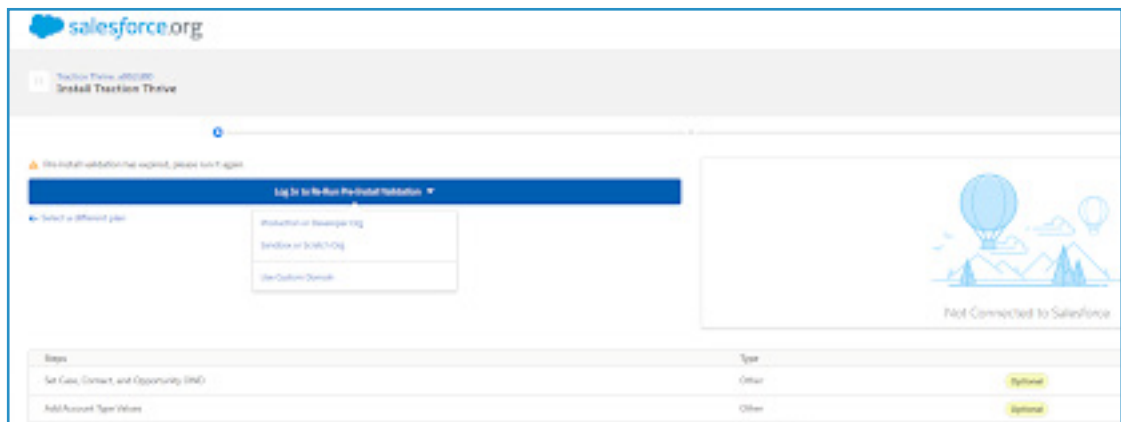


Install Traction Thrive

Traction Thrive Critical Care Resource Management System can be installed by visiting the following site:

<https://install.salesforce.org/products/traction-thrive/install>

Click Install Traction Thrive - View Details





Install Traction Thrive

Select the location for installation. This will open the appropriate Salesforce login screen. Once authenticated, the pre-install validation will run. We recommend all steps are included for a successful installation. We recommend installation on a sandbox Org prior to Production install to check that your org was set up correctly with pre-install items. Click view org once the installation is complete.

This will install the managed package, as well as any automated post-install configuration items to setup your Salesforce Org. Once this is complete, the following will be available for a System Administrator to view:

- Traction Thrive Community
- Traction Thrive Lightning App
- Traction Thrive Service Console
- All Package Components



Post Installation Setup

Once the install has completed, the following configuration will be needed before users and data should be entered into your org.

My Domain

Set a custom domain for your Salesforce Org. This is required to view the Einstein Analytics Home Dashboard for the Traction Thrive Lightning App

- Setup > Company Settings > My Domain
- Choose an available domain and register
- Once ready, Login to test it out
- Deploy to Users





Post Installation Setup

Einstein Analytics

Setup > Analytics > Settings > Enable "Share Analytics with Communities"

Einstein Data Manager:

All Package Components > App Launcher > Analytics Studio > Gear Icon > Data Manager

Click arrow down, select Schedule, select Event-based, then Save.

Repeat for Critical Response Status Reports

Data Manager > Connect

Click arrow on right side of SFDC_LOCAL connector, Run Now

Click arrow on right side of SFDC_LOCAL connector, Schedule

- Schedule by = Hour
- Start At = 12am
- Run Every = 1hr
- Select all 7 days (Sun-Sat)
- Save

Click Monitor refresh Jobs tab until all tasks are done running.

Einstein Analytics Studio:

Select All Items > Find Traction Thrive Resource Management, click down-arrow and Share

ALL ITEMS APPS DASHBOARDS LENSES DATASETS			
Apps			
Title	Description	Created By	Created On
 My Private App	Use this default app to store private or unfinished projects.	Setti Villamor	
 Traction Thrive Resource Management		Setti Villamor	04/09/20, 12:15 AM 
 Shared App		Integration User	
Dashboards			
			Run App
			Share
			Favorite





Post Installation Setup

Check Enable sharing with Communities, making sure Customer Community Users are Viewers. Click Save

 Traction Thrive Resource Management ✕

[GIVE ACCESS](#) [POST TO FEED](#) [GET URL](#)

Shared with:

 Entire Organization Viewer ▼

 Customer Community Users Viewer ▼

Invite others:

User ▼

Viewer ▼

Add

☒ Enable sharing with Communities ℹ

Save

Create Permission Set "Einstein Analytics for Community Plus User"

1. **System Preferences > View Analytics on Communities pages = TRUE**
2. **Once you have a staff member that you want share the dashboards with in the Community, Create them a User and assign "Einstein Analytics for Community User" Permission Set to the User and add Permission Set License Assignment: Einstein Analytics for Community Logins**





Post Installation Setup

Organization Wide Defaults

Ensure the Account - Default External Access is set to Public Read/Write
Setup > Sharing Setting > Edit
Account and Contract = Public Read/Write
Save

Profile Changes

For all Community Profiles:
Customer Community Plus - Health Authority
Customer Community Plus - Hospital Administrator
Customer Community Plus - Medical Staff
Set Knowledge Data Category for Category Group = All to "All"

+ Post Installation Setup

Object Settings:

Cases

Object Permissions: Read, Create, Edit

Assigned Record Types: Master

Page Layout Assignment	Record Type
Support Case Layout	Master

Contacts

Object Permissions: Read, Create, Edit

Assigned Record Types: Master

Page Layout Assignment	Record Type
Contact - Traction Thrive Community Layout	Master



Post Installation Setup

Community Administration

Add Email Sender Address:

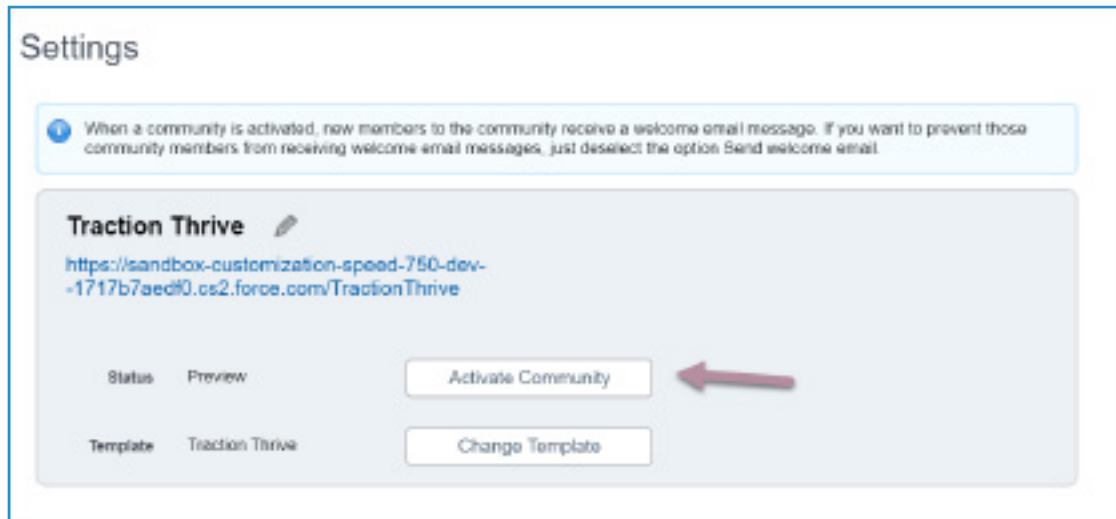
Setup > All Communities > Workspaces > Email

Edit "Email Address" to an address you would like Community emails to be sent from

+ Post Installation Setup

Activate the Community:

Navigate to Setup > All Communities > Workspaces > Administration > Settings and click the Button: Activate





Post Installation Setup

Community Experience Builder

Traction Thrive Community Configuration:

Navigate to Setup > All Communities > Select Builder for Traction Thrive Community

Add Record Detail component to User Profile page

- **Select User Profile page**
- **Remove Related List component under profile image**
- **Drag and drop Record Detail component to page**

Update the Community Page: Contact Support

- **In the Builder, navigate to Contact Support Page and click on the Contact Support Form component**
- **Under Contact Support Form Settings > Authenticated Users, set the Global Action to tractionthrive_NewCommunityCase**
- **Back on the Contact Support page, click on the Component: Record List and set the Filter Name to "Submitted Cases"**

Publish your changes to the community

Publish Community





Post Installation Setup

Availabilities - Batch Class

The CreateAvailabilityBatch Apex batch class is designed to run overnight and automatically create Availability records for Staff. This ensures that there are always new Availability records to update. When Staff.Status__c = On Staff, a new record is created with Availability.Status__c = Available. When Staff.Status__c = Not Available, a new record is created with Availability.Status__c = Not Available

Schedule the CreateAvailabilityBatch batch class to run overnight every day.

- Setup > Apex Classes > Schedule Apex
- Job Name = CreateAvailabilityBatch
- Apex Class = CreateAvailabilityBatch
- Frequency = Weekly (everyday)
- Start = Now
- Start Time 12:00AM
- Save





Post Installation Setup

Contact Support Page

To enable users to submit Cases through the community, you need to perform the following:

Configure the Case Field: Origin:

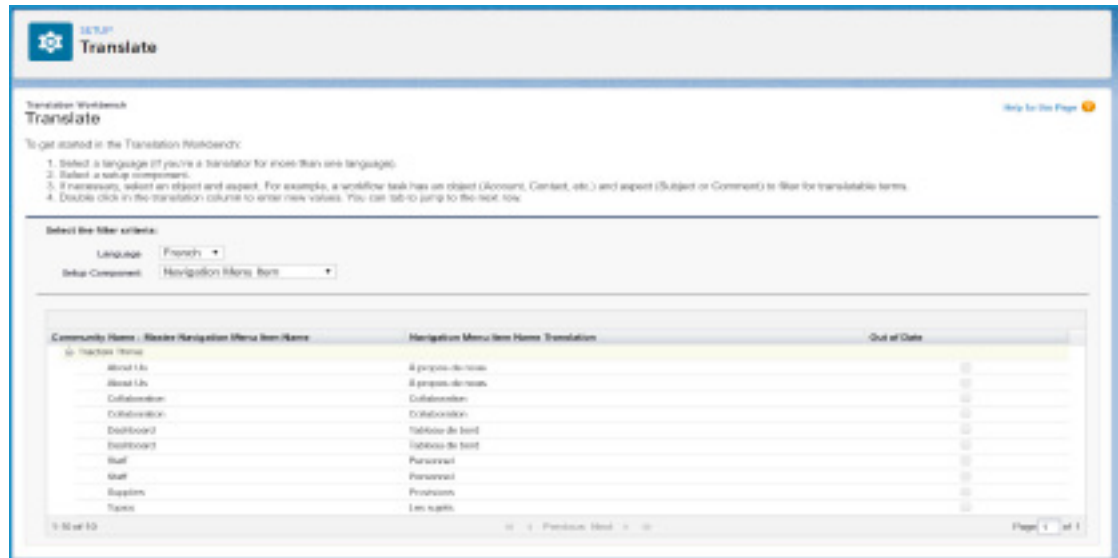
- Navigate to Setup > Object Manager > Case > Fields & Relationships > Case Origin
- On the Section: Case Origin Picklist Values, add the following picklist value: "Community - Traction Thrive" and apply this picklist value to all the record types
- In Salesforce Care Orgs, deactivate "Set Default Entitlement" Process Builder Process
- Setup > Process Builder
- Deactivate the Set Default Entitlement Process

Once the setup is complete, the next step to begin using the application will be to load your Facility data and setup your Community users.



+ Post Installation Setup

Multilingual Navigation Menu Item Translation



If still community doesn't change for the requisite translation, then please check the setup by performing following steps:

- Navigate to Setup > Translation Language Settings > Supported Language > Check if required language is active, if not then :
- Click Edit for the language > Check the active checkbox
- On the Section Identify Translators for this Language: Add all users from Available List to Selected List. Now Save the settings.

Navigate to Setup > All Communities > Click Builder for Traction Thrive.

- It will open the community page, on that page Select icon located on the top right corner of the page. It will show the available languages, select your language and if the navigation menu changes then click publish located on the top right corner.
- Refer this video for more clarification: [Here](#)

Multilingual Navigation Menu Item Translation

For community navigation menu tabs, you need to perform the following:

Navigate to Setup > translate > choose the language one by one from Spanish and French.
From the second picklist select Navigation Menu Item and then expand the Traction Thrive List
For each Community Name : Master Navigation Menu Item Name, we need to insert translation in column Navigation Menu Item Name Translation

Master Navigation Menu Item Name	Navigation Menu Item Name Translation:French	Navigation Menu Item Name Translation:Spanish
About Us	À propos de nous	Sobre nosotros
Collaboration	Collaboration	Colaboración
Dashboard	Tableau de bord	Tablero
Staff	Personnel	Personal
Supplies	Provisions	Suministros
Topics	Les sujets	Temas



Post Installation Setup

Multilingual Language Setting

To enable the currently available language which are French & Spanish as fully supported language, you need to perform the following:

Navigate to Setup > Users > Edit for targeted User

Navigate to Language: From the Picklist Values, Select Español for Spanish and Français for French and save settings



Package Upgrade

To upgrade to the latest version of Traction Thrive, you will need to change your Account Sharing Sharings (Organization Wide Defaults) to Private. Once that is done and your upgrade complete, the setting can be reverted to Public Read/Write.