

GoToAssist Integration White Paper

GoToAssist Integration Services offer a variety of methods to integrate Citrix GoToAssist, the industry-leading remote-support solution, into an existing infrastructure quickly and easily.

Integrating GoToAssist provides a single source for initiating remote-support sessions and viewing support details, allowing managers to easily audit the complete support experience to ensure best practices and processes are followed.

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GoToAssist Overview

With millions of sessions hosted annually, Citrix® GoToAssist® is consistently chosen as the solution for world-class remote support due to faster connect times, high accessibility, end-to-end security and overall ease of use. Support agents can provide high quality support through GoToAssist's incident diagnosis, resolution, survey tools and ability to remotely view and control desktops. The hosted GoToAssist Management Center provides real-time monitoring, feedback reports and historical trends so that management can gain a deeper understanding of their business process and systems usage.

The deployment of GoToAssist can be enhanced by integrating with support systems and other applications. This white paper addresses how GoToAssist works and provides information about available integration options.

Here's how GoToAssist works:

Step 1: A GoToAssist session can be initiated by an end user or by a support agent.

Web Mode: The end user goes to a Web site which hosts a GoToAssist support *portal** and types in a support request. The support request is queued for the next available agent. With the end user's permission, the GoToAssist thin-client is downloaded to the end user's device. The agent then begins a remote-support session with the end user.

Phone Mode: Alternatively, the end user can move directly from a phone call with the agent to a remote-support session. To do so, the agent provides the end user with a URL to a Web support portal* and a unique connection code to begin the remote-support session.

Step 2: The agent can diagnose, troubleshoot and resolve the incident using a variety of incident-resolution tools, including:

- ChatLink
- Remote Diagnostics
- File Transfer
- Reboot/Reconnect
- MultiChat
- Remote Viewing/Control
- Whiteboard
- Session Transfer

Step 3: At the end of the session, the end user immediately provides input on the support experience in a browser-based survey.



* Configuration of the GoToAssist Web support portals, which can be hosted by Citrix Online or placed on any other Web site, comes standard with all GoToAssist implementations.

Integration Overview

Citrix Online offers a variety of methods to integrate GoToAssist into an existing infrastructure quickly and easily. These powerful integration options include the ability for end users to intuitively initiate sessions; support agents to easily manage sessions using their standard support tools; and managers to seamlessly review sessions from within existing support applications.

Listed below are the GoToAssist Integration Offerings:

Out-of-Box Package	<ul style="list-style-type: none">• Database Integration
Software Development Kits (SDK)	<ul style="list-style-type: none">• End User Integration Guide (customer launch)• Agent-Side API/Phone Mode API (support agent)• Sessions API (session data)• Monitors API (monitor agents)

Out-of-Box Package

An out-of-box package can be quickly installed and deployed and does not require programming resources.

- The **Database Integration** downloads all of the hosted GoToAssist session data into standard local databases and saves the session recordings in local directories.

Software Development Kits (SDK)

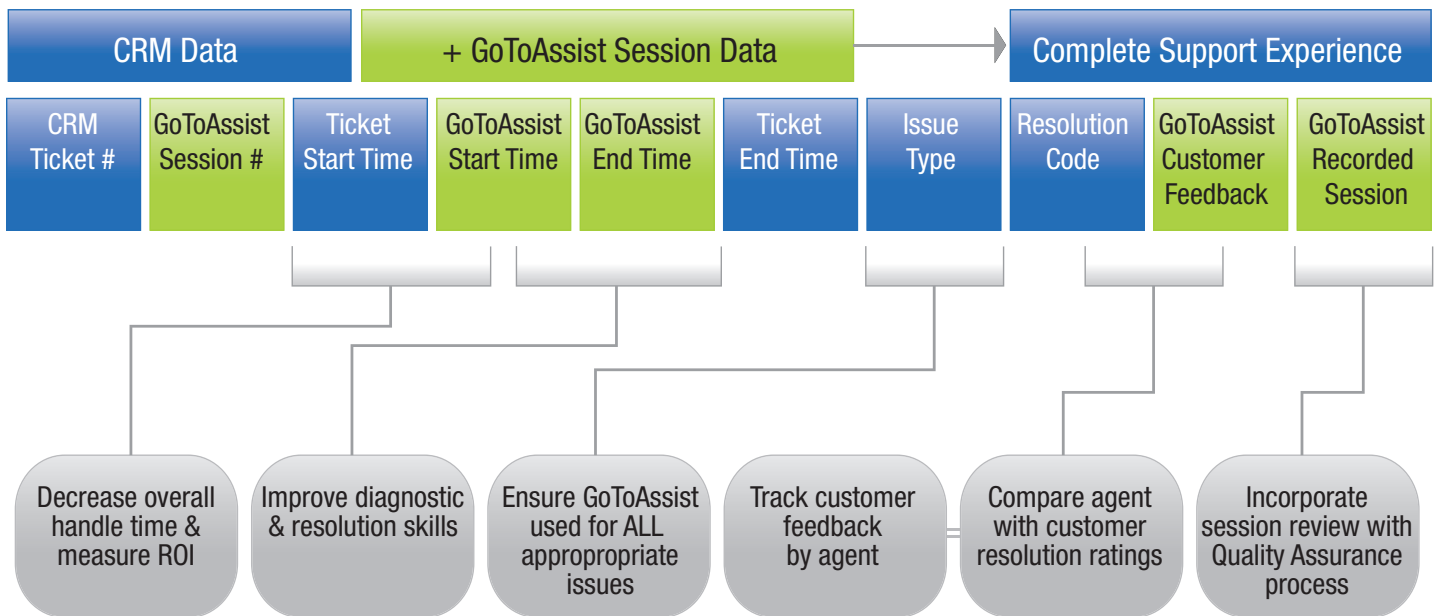
- The **End User Integration Guide** provides guidelines, suggestions and examples for integrating an end user or customer launch request for a GoToAssist session with a Web site or other application.
- The **Agent-Side API** (Application Programming Interface) calls enable the integration of GoToAssist HelpAlert™ functionality with an agent's standard set of support tools. HelpAlert is the application used by support agents to manage GoToAssist sessions.
- The **Phone Mode API** calls, distributed with the Agent-Side SDK, enable the integration of agent-generated connection codes, which can then be given to end users needing to join GoToAssist sessions directly.
- The **Sessions API** calls provide the ability to download session data from the GoToAssist hosted server. This includes all of the session information, such as the initial request, chat transcripts, remote diagnostics, customer survey results, timing information and session recording files.
- The **Monitors API** can monitor support agents' GoToAssist activities, such as the current number of sessions each representative is currently supporting. This enables integration with Automated Call Distribution (ACD) systems, tracking systems and other applications.

The Value of Integration

The primary reason to consider integration is to optimize the support environment for end users, agents and managers. Here are a just a few of the many ways that a GoToAssist integration can bring additional value to a GoToAssist deployment:

- **Making it easy for end users** to get into a remote-support session provides a valuable differentiator for businesses.
- **Streamlining support activities** gives agents more time for customers and allows them to work from a single user interface, eliminating manual steps and excessive training.
- **Understanding utilization patterns** provides management with a valuable method for when to direct support agents to use GoToAssist. Managers can apply best practices and use successful recorded sessions as training tools to improve time-to-resolution.
- **Integration of session data** provides the ability to analyze ROI, survey results and call times. These reports can be linked to support systems and customer metrics can be leveraged to provide feedback across all departments.
- **Saving session data locally for long-term** provides complete control for compliancy purposes of regulatory laws such as the Gramm-Leach-Bliley Act (GLB), U.S. Patriot Act CIP262, Health Insurance Portability and Accountability Act (HIPAA) and the Sarbanes Oxley Act of 2002.

The image below illustrates the value of being able to fully analyze the complete support experience by combining GoToAssist data with the data tracked by a Customer Relationship Management (CRM) system.



Types of Integration

There are three main types of integrations available with GoToAssist:

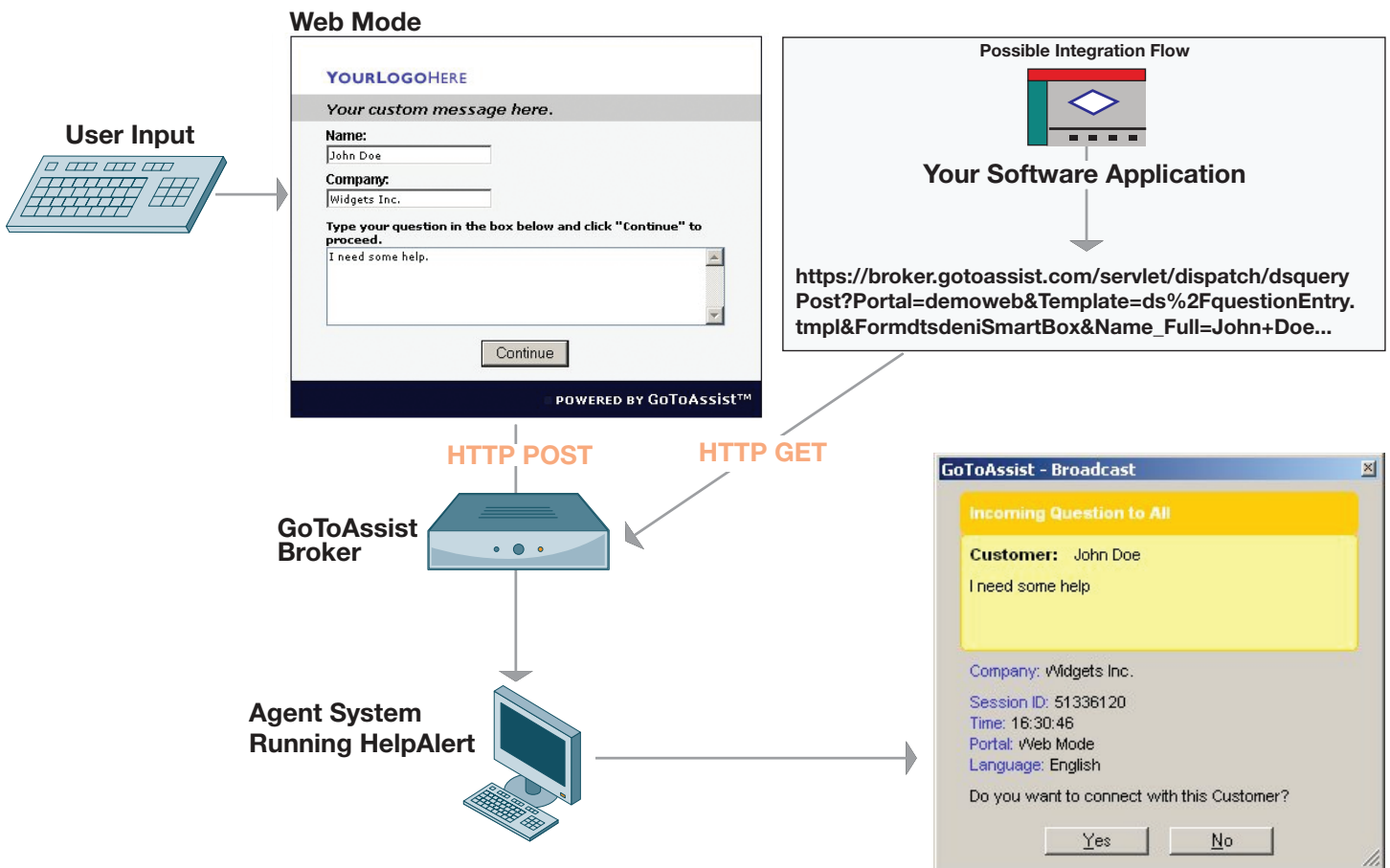
- **End-User (or Customer) Integration:** GoToAssist can be configured in a number of ways. One way is to have end users access a Web form to enter their request. This manual step can then be bypassed through integration. Integrating the launch of the GoToAssist session enables end users to easily request and initiate a session request directly from a Web site or other customer-facing application. Providing end users with an easy, seamless transition from self-service to assisted service streamlines the entire process for requesting and quickly getting into a remote-support session.
- **Agent-Side (Support Representative) Integration:** Support agents can manage their GoToAssist sessions from within their primary support applications. The ability to instantly accept or launch a session, email a GoToAssist connection code or merge incoming GoToAssist session information to automatically create new trouble tickets allows agents to save time by eliminating manual steps. Cases can be solved through automated root-cause analysis from the diagnostics data captured via GoToAssist. This is a client-side integration that works on a per-agent basis.
- **Data Integration:** All the GoToAssist session data, such as survey results, chat transcripts and session recordings, can be automatically stored locally and accessed from within support applications. Managers can review a trouble ticket and all the corresponding GoToAssist session information directly from the ticket for a more complete understanding of the support case. Saving session data locally enables management to maintain and control it for long-term, create more complete reports of support history and be instantly alerted to critical support issues, such as a negative session rating. Locally storing and protecting session data also helps ensure compliance of government regulations such as the Gramm-Leach-Bliley Act, U.S. Patriot Act, HIPAA and Sarbanes Oxley Act. Status data to monitor when agents are in GoToAssist sessions and when they are available can also be accessed and applied to applications that route support requests. This is a back-end integration which provides access to data from all sessions.



End-User Integration

One method of getting into a GoToAssist session is through the end user's submission of the support request from a hosted form called a SmartBox. The SmartBox is a ready-to-use Web form, provided by Citrix, which can be specially branded and placed on any Web site. This form can be configured with required and/or optional fields for end users to fill out to launch the GoToAssist request.

Creating an automated method for quickly launching a GoToAssist session request can greatly improve the support experience for end users and provide a seamless integration with existing customer-facing hosted or non-hosted support applications. The creation of the HTTPS request, required to initiate a GoToAssist support request, can be easily created programmatically or via a script and launched without requiring an end user to fill out a Web form or even see the Web browser. After the session has ended, information can also be automatically entered into the survey fields, also hidden from the end user. The ability to launch GoToAssist automatically for the end user does not require API calls.



Benefits of end-user integration include:

- **Automate Launch:** Scripts or applications can be created to automatically enter required information into the GoToAssist support-request form so that end users do not need to manually enter known information. This streamlines the process for requesting remote support.
- **Capture System or Application Information:** Information from the end user's system, such as a unique system identifier, for example, can be passed into fields unseen by the end user during the submission of a GoToAssist support request. Similarly, valuable information from an end user's application, such as the customer account number, can be seamlessly passed into a GoToAssist session request. This eliminates the need for end users to re-enter information and ensures information accuracy. Upon responding to the GoToAssist request, support agents are presented with helpful and accurate information about the end user.
- **Skills-Based Routing:** One way to implement skills-based routing is through end-user integration. GoToAssist portals (e.g., support queues) can be configured with multiple sub-portals. Each sub-portal can represent a skill set. Support agents, logged in to one or more sub-portals, receive the support requests routed to the sub-portals to which they belong. A front-end application that determines the end user's requirement can be enhanced to automatically send the GoToAssist request to the appropriate sub-portal so that the agent with the appropriate skill or experience supports the end user's request.

For More Information: Contact Citrix Online to request the **GoToAssist End-User Integration Guide**, which provides examples and advice about how to embed the GoToAssist launch request into a Web site or other application.

Agent-Side Integration

GoToAssist offers a comprehensive set of agent-side API calls to automate the support agent functions. Software developers can use these calls to integrate support applications with GoToAssist.

CRM Integration

One type of agent-side integration is integration with CRM, help desk or other trouble ticketing applications. Agents can use their standard support interface to manage GoToAssist functions. Examples include launching a new GoToAssist session from within a CRM interface and automatically capturing and storing incoming GoToAssist request information into a trouble ticket.

The **GoToAssist Agent-Side API** is delivered along with a fully functional demonstration application that can be quickly installed on any support agent's system. This "mock CRM" application is designed to show how agents can perform GoToAssist functions, such as sending a file, transferring a session or capturing chat and remote diagnostics, from the CRM. A tutorial is provided to walk through each integration option.

The screenshot displays the 'GoToAssist Agent-side SDK Demo' application interface. On the left, a 'GoToAssist - Broadcast' window shows an 'Incoming Question to All' for 'John Doe' with the message 'I need some help'. A red arrow points from this message to the 'GoToAssist' window, which has a 'Start New Session' button highlighted. The 'GoToAssist' window shows a 'Customer Information' form with fields for Name (John Doe), Address (Citrix Online, 5385 Hollister Ave, Santa Barbara, CA 93111), Email (john.doe@company.com), and Phone # (805.630.6400). Below this is a 'Case ID' list with '4' selected. The 'GoToAssist' window also shows a 'Queue' with a 'Question: I need some help; Session: 30953101'. On the right, a blue box contains the text: 'Integrate GoToAssist with a Ticketing System: • Automatically create a new ticket from an incoming GoToAssist request • Start a new session from within the CRM'. A red arrow points from the 'GoToAssist' window to the 'Start New Session' button.

The **Agent-Side API** is based on Microsoft's Component Object Model (COM) and can be used with programming languages such as C++, Visual Basic, VBScript, JScript or any language that supports COM.

The source code for the demonstration application (written in C++) is included upon installation in a separate subdirectory for review so that programmers can see how the entire "mock CRM" application was created and specifically see how each API call was made to implement the integration function demonstrated. The **GoToAssist Agent-Side API Developer's Guide** is also included to describe all the API calls for software developers. The goal of the demonstration application is to provide ideas for performing agent-side integration.

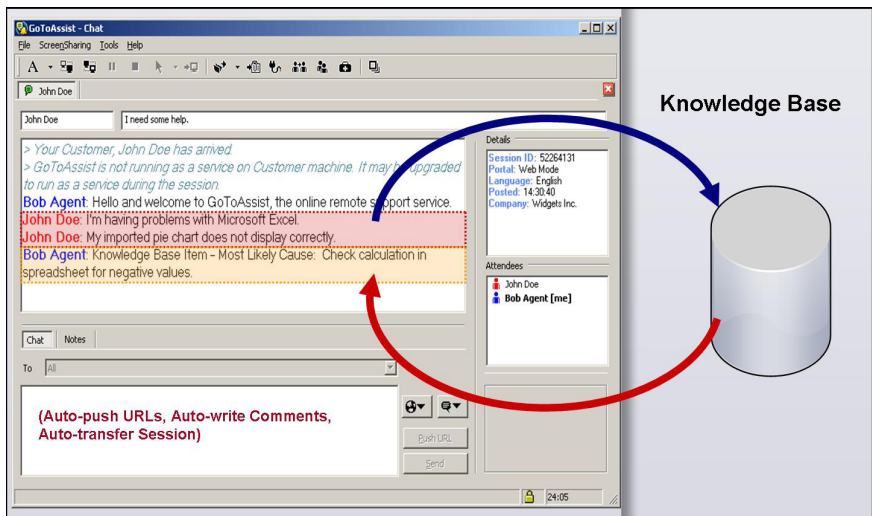
The **Phone Mode API** is an additional option for integrating GoToAssist Phone Mode functionality with Web browser support applications. Using Web Services API calls, agents can generate and cancel GoToAssist connection codes from within the interface of their Web-based application.

Using the **Phone Mode API** generation method, the CRM ticket number, case ID or other unique identifier can be instantly pushed to and associated with the GoToAssist session. This unique identifier is then stored along with the rest of the GoToAssist session data. Later retrieval of the hosted GoToAssist session data thus also contains the unique identifier from your CRM system, which enables easy integration of the data into your CRM. The **Phone Mode API** is a good option for Web browser support applications.

Knowledge Base Integration

Another type of agent-side integration is knowledge base integration. The growth of knowledge bases as a means to help support agents diagnose and solve problems is a valuable asset for many companies. There is a wealth of data in the GoToAssist customer remote diagnostics and chat logs that, when integrated, can be used to automatically retrieve information from a knowledge base and save the agent from manual searches.

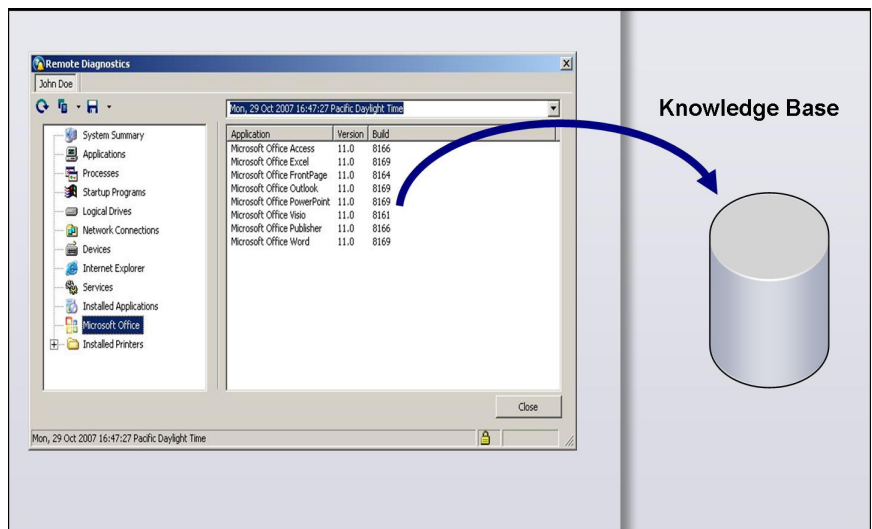
An example of knowledge base integration is illustrated below. The agent receives chat from the end user who describes a problem with an application. The chat transcript is automatically captured during the session and entered into a knowledge base. A potential solution is found and presented to the agent. The agent selects the solution and it is automatically written into the GoToAssist chat window and sent to the end user.



Automate Support Functions:

- Auto-capture customer chat
- Auto-send solutions back to customer

Another example is using a knowledge base to analyze diagnostics information. When the agent uses GoToAssist to receive remote diagnostics from an end user, the information can be automatically captured and entered into a knowledge base that checks and verifies the version numbers of installed applications. If the end user has an application that is out of date, a message can be displayed to the agent indicating that an upgrade is recommended. The agent can then send the upgrade information to the end user by automatically pushing a URL or automatically sending a file via GoToAssist.



Automate Diagnostic Functions:

- Auto-capture remote diagnostics
- Auto-check version numbers

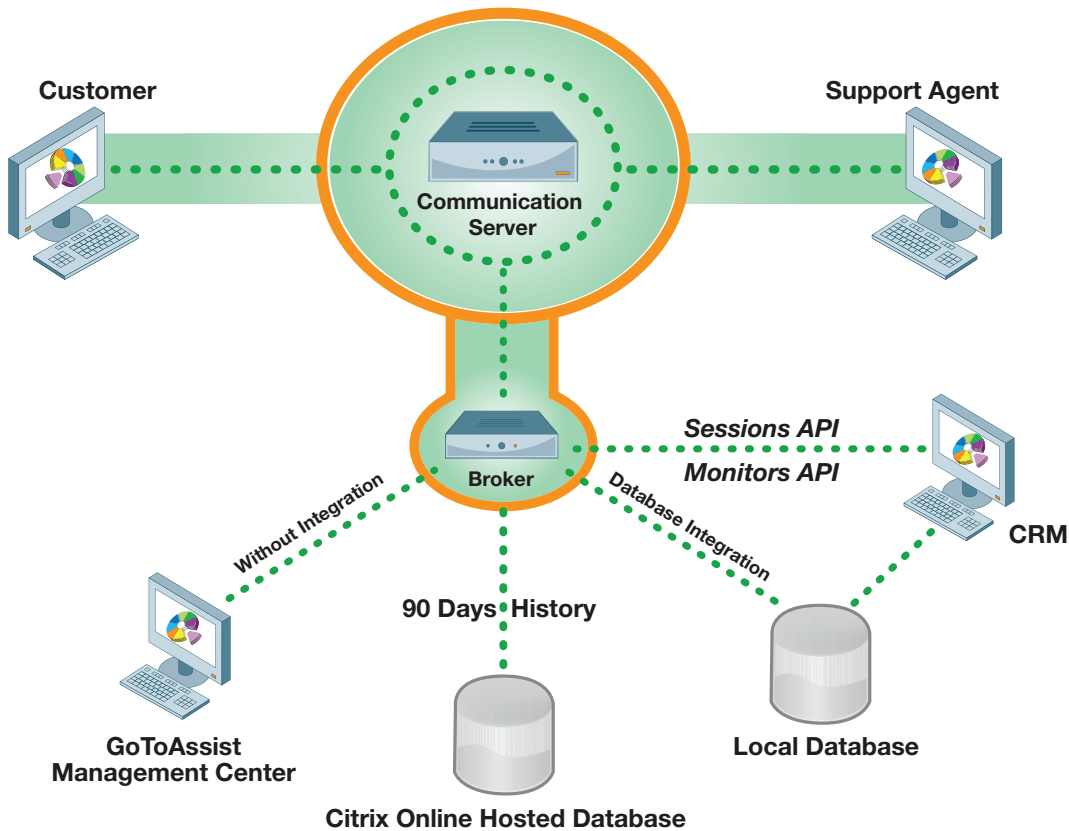
For More Information: Contact Citrix Online to request the *GoToAssist Agent-Side Software Development Kit*, which provides the demonstration application with tutorial, *Agent-Side API Developer's Guide* and *Phone Mode API Developer's Guide*.

Data Integration

GoToAssist session data, such as survey results, chat transcripts and session recordings, can be automatically stored directly into trouble tickets, applications or local storage facilities. This allows managers to view data within support applications and saves agents time to manually document each call. Saving and merging GoToAssist session information with trouble tickets or business intelligence systems enables long-term storage of data within local systems and provides a more complete view of support metrics for continuous performance improvement. Real-time data that shows when agents are in GoToAssist sessions can also be downloaded. This agent availability data can be integrated with queuing systems to more efficiently route customer support requests.

GoToAssist data is saved and hosted by Citrix Online for 90 days. Managers can access the data by logging in to the hosted **GoToAssist Management Center**, which provides a report interface to view sessions and replay recordings. Using integration, this data can be directly obtained from the GoToAssist hosted system.

Two options are available for downloading session data; a third option is available for obtaining agent status.



Data Integration:

Session Data

- Download into local database via out-of-box GoToAssist Database Integration
- Develop program to access data and write directly into applications via Sessions API

Agent Status Data

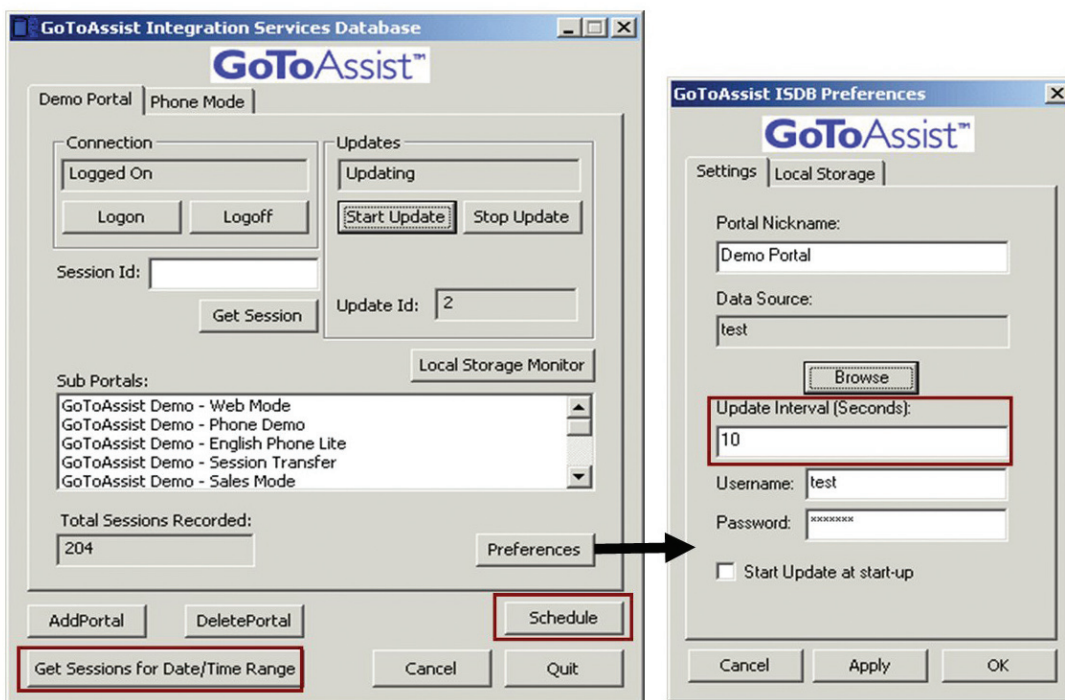
- Develop program to access agent availability data and write directly into applications via Monitors API

1. Develop a program using the **Sessions API** to access hosted session data and write it into an application, such as a CRM system; or
2. Deploy the out-of-box **Database Integration Package** to store session data into a local database and save session recording files into a local directory. The CRM system can then read the session data from the tables of the local database.
3. Develop a program using the **Monitors API** calls to obtain the status of agents in session and requests waiting in a queue.

Database Integration Package

The **GoToAssist Database Integration Package** is an out-of-box option which stores all of the GoToAssist session data into designated local databases. This package is easy to install – most customers have it up and going in less than 30 minutes. The package consists of three clients:

1. **Database Client:** Runs as a Microsoft® Windows® service to download hosted GoToAssist session data into local databases. Data can be downloaded in real time, on a scheduled basis or on-demand for a date/time range (for the past 90 days).
2. **Reporting Client:** Reports on the downloaded data stored in the local database.
3. **Session Review Client:** Provides an interface to review the locally stored session recordings, chat transcript and remote diagnostics.



Easy Setup – 3 Ways to Download Hosted Session Data:

- Real Time: Check for new sessions every 10 seconds
- On-Demand: Get sessions for date/time range
- Schedule: Download data on a scheduled basis (e.g., nightly)

This package provides database administrators with an easy, intuitive setup; support for Microsoft® Windows® service functionality; and a well-defined standard database schema for storing the GoToAssist session data. Scripts and instructions are provided for Microsoft® SQL Server, Oracle®, MySQL®, Ingres® r3 Open Source and IBM DB2®. Other databases can be configured manually. ODBC (Open Database Connectivity) is used to write the downloaded data into the database.

Storing GoToAssist session data in local databases gives CRM, ERP (Enterprise Resource Planning) and database administrators the ability to more easily integrate it with back-end applications using familiar database tools or standard SQL calls. Maintaining GoToAssist session data locally provides greater flexibility for integration, long-term storage and security.

For More Information: Contact Citrix Online to request the **GoToAssist Database Integration Package**.

Monitors Integration

The GoToAssist hosted system can be polled in real time to determine which agents are in a GoToAssist session and which customer requests are waiting in a queue. From the hosted **GoToAssist Management Center**, this monitor information can be view using the Dashboard option. Pictured below are two example monitors: the Representative Monitor and the Active Queues Monitor.

GoToAssist™
DASHBOARD MONITORS

Representatives
Refresh Rate: 30 Seconds

Portal: Any Team: Any

Available: 3 In Session: 2 Total: 5

Rep	Status	Time	Logout
Ryan Agent	AVAILABLE	00:08:33	✕
Terry Agent	AVAILABLE	00:32:45	✕
Bob Agent	IN SESSION	00:04:17	✕

Active Queries
Refresh Rate: Manual Refresh

Portal: - Web Mode

Total: 2 Postings: 1 Active Sessions:

Rep	Query	Status	Time	Acti
Bob Agent	I need some help	IN SESSION	00:04:17	✕
N/A	I can't access my progr...	POSTED	00:00:34	>

This status data can also be retrieved using the **GoToAssist Monitors API**. Integrating the status of agents using GoToAssist with existing routing systems can improve the overall efficiency of response for incoming phone calls and other support requests.

For example, when an agent is in a GoToAssist session, incoming phone calls should be routed to other available agents. Many automated call distribution (ACD) systems can accept status information from other applications. The agent status data from GoToAssist can be provided to the ACD to indicate when agents are unavailable to accept incoming calls.

Another example is to trigger an alert if the number of customers waiting in a GoToAssist queue for Web-based help reaches a certain threshold. Knowing how long customers are waiting for support can help management better schedule appropriate resources.

Combining GoToAssist monitor data with “smart queuing” or ACD systems enhances customer support. The **GoToAssist Monitors API** helps achieve a more complete integration with defined routing systems.



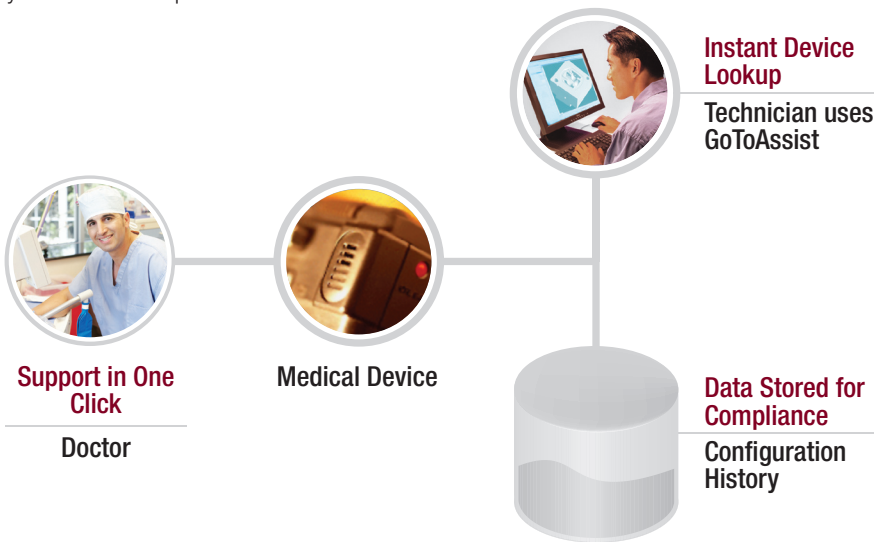
Automatic Call Distribution of Remote Support session is routed to next available agent
Monitor Agents: Who is in session? Who is available? Integrate with ACD or “Smart Queuing” systems

For More Information: Contact Citrix Online to request the **GoToAssist Monitors Web Services API Developer's Guide**.

Integration Case Study

A leading medical device manufacturer in North America uses GoToAssist to support doctors using their systems in hospitals and clinics around the country. GoToAssist integration streamlines the support process for all the participants. These systems capture images and video from a surgical camera and are connected to PCs which are connected to the Internet. The following types of integration are used in this deployment.

- **End-User Integration:** The doctor requests assistance to configure the device by selecting a help menu item from the application deployed on the PC. There is no need for the doctor to enter any information because the required serial number and doctor's information is automatically sent to a technician via GoToAssist.
- **Agent-Side Integration:** The technician receives the request with the serial number captured via GoToAssist. The serial number is automatically referenced by the support system so that the technician instantly knows the device and doctor being supported. During the session, the technician can retrieve real-time diagnostics to compare with historical session information and determine the differences from when the device was last working properly.
- **Data Integration:** The manager is responsible for ensuring compliancy with government regulations. All GoToAssist session recordings and device configurations are maintained and secured for years in the local database. This information can be retrieved, if necessary, to comply with HIPAA requirements.



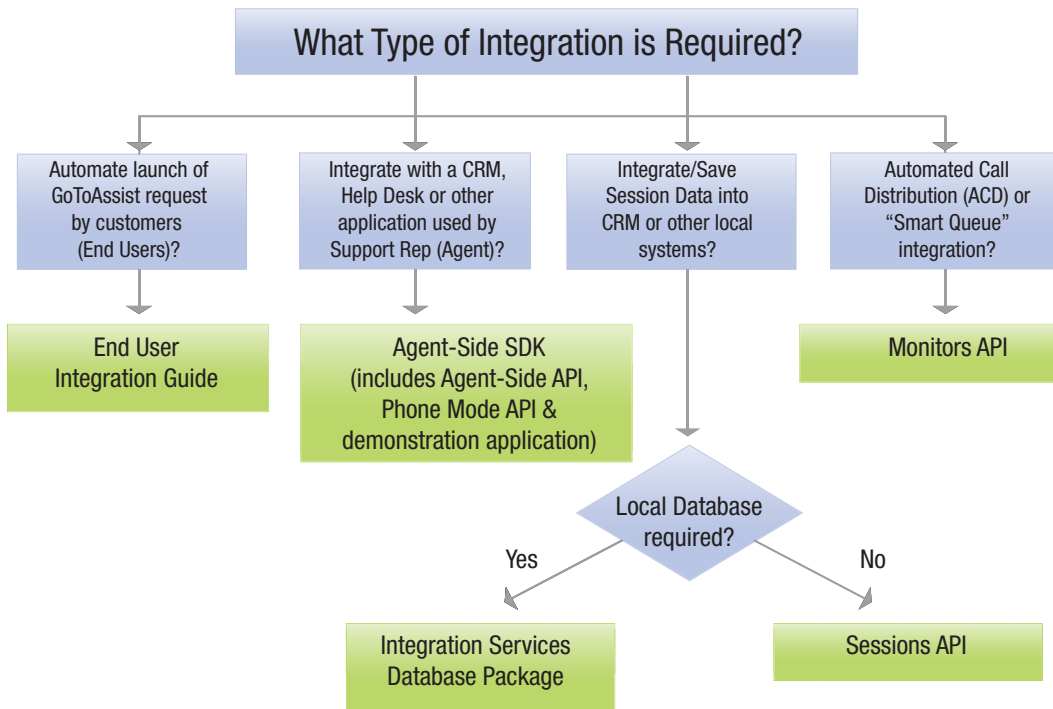
Previously the devices were sent back to the manufacturer for configuration issues. GoToAssist integration provides these benefits:

- **Instantaneous Resolution:** The simple click of a button brings a support agent online immediately to configure the device.
- **Saves Shipping Costs:** Manufacturer saves money by avoiding shipping costs.
- **Saves Doctor's Time:** Doctors find it easy to get support, which saves time and frustration.
- **Improves Patient's Health:** Patients are not required to come back for multiple visits when a device is not ready, thus improving the speed of diagnostics.

Conclusion

Citrix GoToAssist offers many types of integration options to streamline workflow and preserve session information within support applications. Below is a chart of the various integration solutions available.

Deploying GoToAssist integration can enhance business operations in the following ways:



Citrix Online

Citrix Online division

Product information:

<http://express.gotaoassist.com>

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Phone: 805-690-2961

www.citrixonline.com

For more information on Citrix GoToAssist Express, please visit <http://express.gotaoassist.com>

- Provides end users with easier support by enabling them to get into remote-support sessions faster
- Streamlines workflow for agents by eliminating manual steps
- Saves and maintains session information locally for compliance purposes and for more comprehensive analysis and reporting

About Citrix Online

Citrix Online, a division of Citrix Systems, Inc. (Nasdaq: CTXS), is a leading provider of easy-to-use, on-demand applications for remote desktop access, Web conferencing and collaboration. Its award-winning services, which are used by more than 20,000 businesses and hundreds of thousands of individual subscribers, include: Citrix® GoToMyPC® for remote PC access; Citrix® GoToAssist® for live remote support; Citrix® GoToMeeting® for online meetings; and Citrix® GoToWebinar™ for do-it-yourself Web events. Based in Santa Barbara, California, Citrix Online has offices around the world. For more information, please visit www.citrixonline.com.

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