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## Citrix Online, div. of Citrix Systems Inc.

# GoToAssist™

Product Category: Knowledge Management/eSupport

Validation Date: 2/22/2005

### Product Abstract

GoToAssist enables businesses to securely interact in real time with customers, suppliers and end users, regardless of location. And for its most popular customer environments – support call centers and internal help desks – GoToAssist provides best-practices tools, support-infrastructure integration and detailed reporting.

Traditional phone - and Web-based support agents using GoToAssist have the flexibility to chat online with customers, show a live product demo, "push" a Web page, transfer files, view diagnostic information and take permission-based control of the customer's mouse and keyboard to resolve a problem. The ability to analyze diagnostic information and share and control the customer's screen enables agents to quickly troubleshoot problems. Customers can view and control an agent's screen for educational and training purposes. The remote-control or screen-sharing function can be terminated by either party at any time. Session recordings, including chat transcripts, captured diagnostics, customer survey results and all other session information can optionally be captured for future viewing.

Since GoToAssist is managed over Citrix Online's hosted Management Center, deployment of remote-control access across the entire organization is seamless. Security is maintained by Web servers or brokers that generate AES session keys to agents and customers. The brokers hand off sessions to clustered communication servers that bring an agent and a customer together over a secure, 128-bit AES encrypted channel.

GoToAssist's award winning solution is consistently chosen by support organizations over other solutions due to better security and faster incident-resolution times.

### Integration Summary

GoToAssist integrates seamlessly with standard and customized Remedy Help Desk and Remedy Customer Service and Support (CSS) applications for a multitude of support scenarios including Web-initiated and phone-initiated, support sessions. The integrated solution delivers accurate, real-time information about customers and sessions.

The integration is organized into three parts to easily enable any or all implementation options.

**GoToAssist Remedy Data Storage:** An installable Microsoft Service Client is provided. This client can be configured to run in real-time, on demand or on a scheduled basis to download GoToAssist session data from the hosted GoToAssist Broker into defined AR System® forms on specified AR System servers. GoToAssist session data includes: Customer website entries (called *SmartBox* entries), representative information, survey results, and resolution statistics. The session chat transcripts, remote diagnostics and highly-compressed screen sharing files can also be stored directly into the defined AR System forms and/or in local directories for archival purposes.

**GoToAssist Remedy Application Integration:** The AR System forms that contain the GoToAssist session data can be linked with an associated AR System ticket from Remedy Help Desk, Remedy CSS or any custom AR System application. This allows GoToAssist sessions to be instantly

reviewed directly from within the AR System ticket tracking application. AR System workflow is provided for import and easy setup.

**GoToAssist Remedy Agent Integration:** AR System support agents can initiate GoToAssist remote control sessions and respond to customers requesting remote control sessions directly from within AR System applications. The agent-installable GoToAssist *HelpAlert* integration links with Remedy User enabling agents to support customers using two methods:

- **Web Mode:** When an agent accepts an incoming GoToAssist request, a new AR System ticket is instantly created and displayed in Remedy User with the associated customer information (as entered by the customer in the Support Website *SmartBoxes*). Agents can then use the AR System support form to access customer information and manage the ticket during the GoToAssist session.
- **Phone Mode:** An agent can click a button on the AR System support form to create the GoToAssist phone mode code and optionally e-mail the URL link containing the code to the customer to start a screen sharing session.

After the session has completed, the GoToAssist session information is downloaded from the hosted GoToAssist broker and filled in to the associated AR System GoToAssist forms.

The automated creation of customer support tickets through the initiation of GoToAssist support sessions and automated session data population of AR System forms reduces support representative resource requirements and ensures complete, accurate and efficient data capture.

Integration is accomplished by doing the following:

1. Importing the GoToAssist session forms into the Remedy AR System server.
2. Installing the GoToAssist Remedy Client application on either the Remedy AR System server or on a machine other than that on which the AR System resides.
3. Setting up communication with the GoToAssist ASP Host and the Remedy AR System using the GoToAssist Remedy Client.
4. Creating workflow within the AR System to integrate with the AR System application.
5. Optionally installing the Agent-side integration to Remedy User.

The GoToAssist Remedy Client is installed on either the AR System server or a Windows server on the same LAN as the AR System server and communicates with the GoToAssist ASP Host via the Internet. The GoToAssist ASP Host in turn pushes customer, support representative, and session information through the GoToAssist Remedy Client to the GoToAssist session forms using the AR System API. Subsequently, the GoToAssist session forms can trigger AR System workflow to integrate with standard or customized Remedy Help Desk and CSS applications.

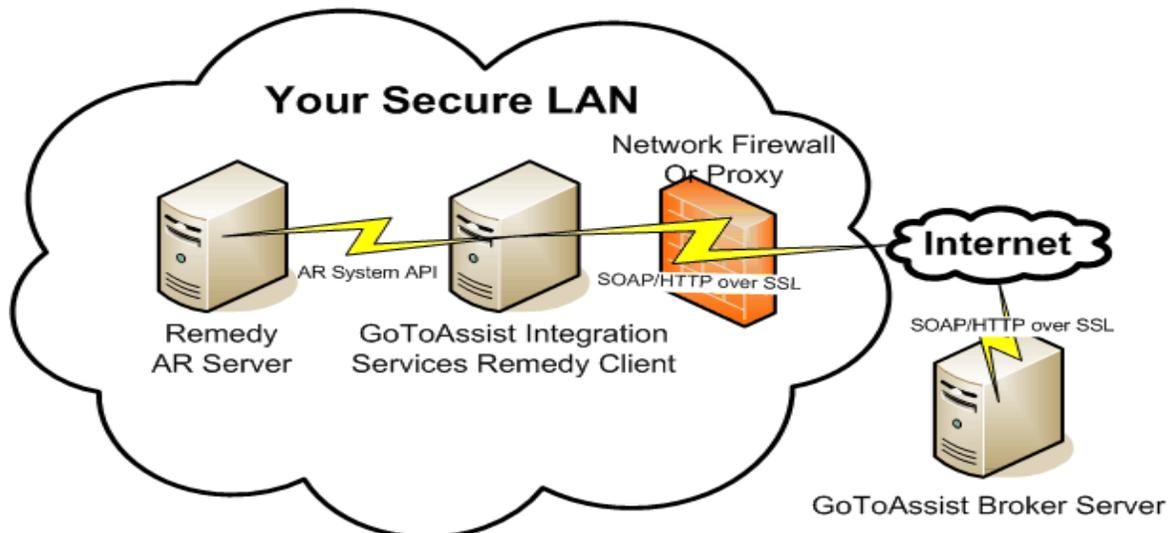


Figure 1 Integration Between GoToAssist and Remedy AR System

## Support Information

The integration described in this note is supported by Citrix Online. Citrix Online develops, markets, and supports the installation of GoToAssist and its integration with BMC software.

For Sales Support please call 800-549-8541 (outside the United States, call +1-805-690-5729) or visit the Citrix Online Website at <http://www.gotoassist.com/contact.tmpl>

For Customer Support, please call 888-259-8414 or visit the Citrix Online Support Website at <http://www.gotoassist.com/contactSupport.tmpl>

## System Requirements

The following Citrix Online software and BMC products must be installed and operating correctly prior to the integration:

- Remedy AR System 4.0.1, 5.0 or 6.0.1 or later
- Optional: Remedy Help Desk 4.0, 5.0 or later
- Optional: Remedy CSS: Customer Support 4.0, 5.0 or later
- Citrix Online Software GoToAssist 6.0 or later.

### Server Requirements

- Microsoft Windows 2000, 2003, or XP
- Remedy AR System Server Connection & Login
- Minimum of Pentium 300 with 64MB of RAM
- Stable Internet connection with ISDN or better
- Ability to make direct outgoing TCP connections or availability of a SOCKS server
- 30 MB of available disk space, plus additional space for optional downloaded GoToAssist session data

### Client Requirements

- Microsoft Windows 95 or later, Windows NT 4.0, 2000, ME or XP
- Microsoft XML 4.0 or higher.

Note: If the Agent-side integration application is installed using the G2AHARemedySetup.exe procedure, MSXML 4.0 is provided and does not need to be installed.

- Java Runtime Environment v1.3 or higher.

Note: Since many applications install the Java Runtime Environment, it may already be available; however, it can also be downloaded from <http://java.sun.com/>

- 15 MB of available disk space

## Contact Information

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## Integration Details

This integration note assumes that a GoToAssist portal has been set up and that the Remedy AR System and GoToAssist HelpAlert are already installed and working correctly as independent applications. It also assumes that the reader is familiar with GoToAssist HelpAlert and the Remedy AR System. For help concerning these systems, refer to the appropriate product documentation.

The GoToAssist Remedy Integration is a ZIP file containing the following:

- GoToAssist Remedy Integration Manual (*GoToAssist Integration Services Remedy User Guide.pdf*)
- GoToAssist Remedy Software installer (*G2AISRemedy\_Setup.exe*)

**Remedy AR System Server Integration:** GoToAssist integration with the AR System is accomplished by doing the following:

- Installing the GoToAssist Remedy Software
- Importing the GoToAssist Session forms
- Configuring the **GoToAssist:AdminPreference** form
- Configuring the **GoToAssist Integration Services Remedy Client**
  - Setting up communication between the GoToAssist Broker and the Remedy AR System server
  - Optionally entering the location(s) for the GoToAssist Session storage (i.e. session recordings can be saved in AR System forms, in local directories or in both locations)
- Importing (or creating) the related workflow within the AR System to integrate GoToAssist session information with the desired AR System application.

**Remedy User Integration:** GoToAssist HelpAlert integration with Remedy User is accomplished by doing the following:

- Installing the **GoToAssist HelpAlert Remedy** application
- Configuring the **GoToAssist HelpAlert Remedy** application
- Logging into the AR System via the **GoToAssist HelpAlert Remedy** application

These steps are discussed in the following sections.

**Note:** Please refer to the **GoToAssist Integration Services for Remedy User Guide** for detailed instructions.

### GoToAssist Remedy AR System Server Integration

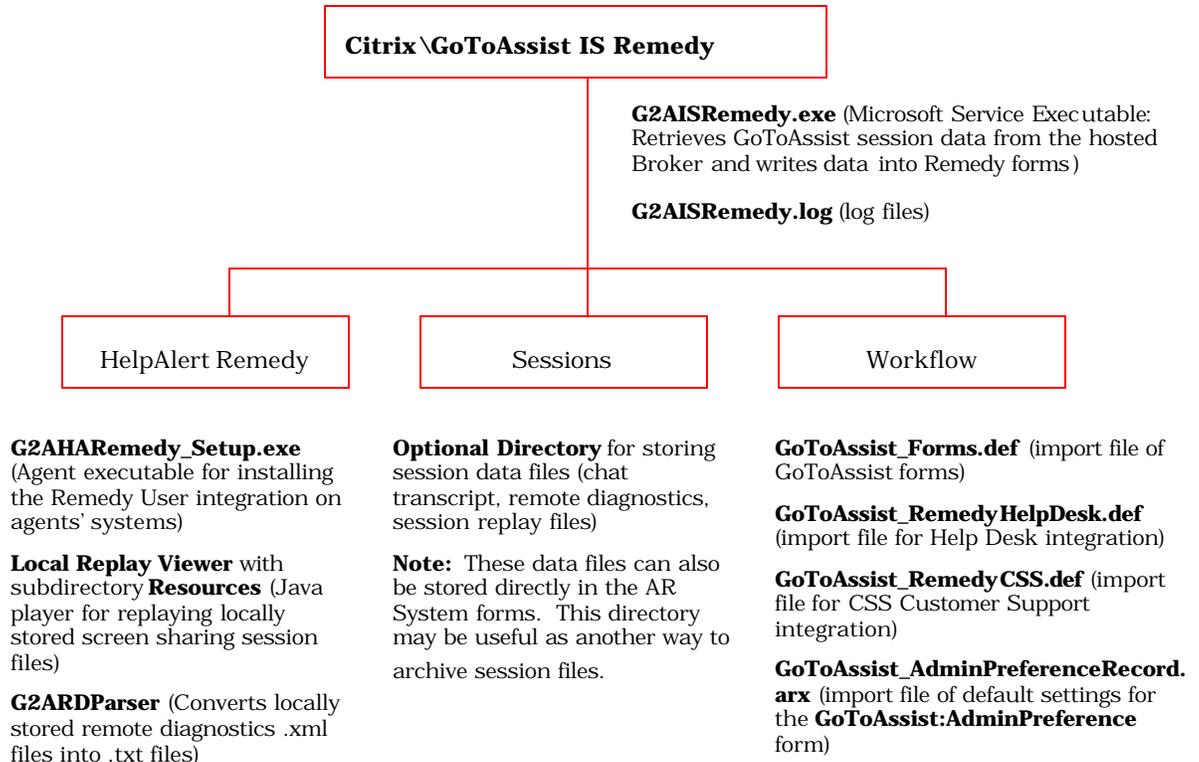
The *G2AISRemedy\_Setup.exe* will guide you through the installation of the **GoToAssist Integration Services Remedy Client** (a Microsoft Service) and will create a directory on your system containing the forms and workflow (.def files) for import.

- **New Windows Service:** You will see the following Microsoft Windows Service installed on your system: **GoToAssist Integration Services Remedy**

This service retrieves GoToAssist session data from the hosted GoToAssist Broker using Secure Socket Layers (SSL) and stores the data into AR System forms.

- **New Directory:** A new directory will be installed on your system. By default the installation directory is: **C:\Program Files\Citrix\GoToAssist IS Remedy**

The directory structure is pictured below.



## Importing the Remedy GoToAssist Session Forms

The GoToAssist Session forms and associated Active Links must be imported into the AR System server. Use Remedy Administrator and select the **GoToAssist\_Forms.def** file located in the subdirectory: **Citrix\GoToAssist IS Remedy\Workflow**

The GoToAssist Session forms are as follows:

**GoToAssist:Session** – This is the primary form containing the GoToAssist session data. There are three tables on this form: (1) SmartBox table; (2) Customer Ratings table and (3) Representative Ratings table. Three backend forms are used to create these tables:

- **GoToAssist:SmartBox**
- **GoToAssist:CustomerRating**
- **GoToAssist:RepRating**

**GoToAssist:AdminPreference** – This is the preferences form set by the AR System administrator to define the names of the GoToAssist forms.

**GoToAssist:HomePage** – (For Agent Integration) This is the default form displayed whenever the Agent logs into the GoToAssist Remedy User integration.

**GoToAssist:Representative** – (For Agent Integration) This form is used to define the agent's AR System login with his/her corresponding GoToAssist logins for single sign-on.

**GoToAssist:PhoneCode** – (For Agent Integration) This is form used to manage phone mode codes. Optionally, agents can e-mail a URL containing the phone mode code to a customer for instant GoToAssist session connection.

## Setting Form Preferences

The **GoToAssist:AdminPreference** form must be configured. Import the default settings and modify them as needed. You will only need to modify the settings if you rename the GoToAssist session forms. If you are integrating the **GoToAssist:Session** requests with AR System application requests, then you will also need to select the name of the primary AR System application form.

Use Remedy Import and select the **GoToAssist:AdminPreference** form and the **GoToAssist\_AdminPreferenceRecord.arx** file located in the subdirectory: **Citrix\GoToAssist IS Remedy\Workflow** to import the default settings.

Open the **GoToAssist:AdminPreference** form and modify as appropriate.

The screenshot shows a web browser window titled "Remedy User - [GoToAssist:AdminPreference (Modify)]". The browser's address bar shows "Modify GoToAssist:AdminPreference 000000000000001". The page features the Citrix GoToAssist logo and the text "Citrix GoToAssist Administrator Preference".

The form is divided into several sections:

- GoToAssist Home Page:** A text input field containing "GoToAssist:HomePage".
- GoToAssist Session Information:** A section containing four text input fields:
  - Session Form: "GoToAssist:Session"
  - SmartBox Form: "GoToAssist:SmartBox"
  - Customer Rating Form: "GoToAssist:CustomerRating"
  - Representative Rating Form: "GoToAssist:RepRating"
- GoToAssist Application Integration:** A section containing one text input field:
  - Reference Form: "HPD:HelpDesk"
- GoToAssist Agent Integration:** A section containing three text input fields:
  - Representative Form: "GoToAssist:Representative"
  - Phone Code Form: "GoToAssist:PhoneCode"
  - Phone Code Email Text: A dropdown menu showing "GoToAssist Session Request" with a preview of the email text: "Please join my session at \$URL\$".

A note at the bottom of the form states: "Note: Use the variable \$URL\$ where you want the GoToAssist Session url to appear in your email message." The status bar at the bottom of the window shows "Ready" and "Demo".

## Configuring the GoToAssist IS Remedy Client

The Remedy Client allows you to capture sessions from multiple portals simultaneously. Each portal appears as its own tab in the Remedy Client's interface.



**Portal Nicknames** – These are the common names of your portals displayed on the tabs in the Remedy Client.

**Logon** – This connects you to the broker, allowing you to retrieve session data in real time. Note that you do not need to be logged in when you retrieve data on-demand (**Get Session for Data/Time Range**) or when you retrieve data via the **Schedule**.

**Logoff** – This ends your connection with the broker (affects Real Time updates only).

**Start Update** – This starts the Real Time updating process.

**Stop Update** – This stops the Real Time updating process.

**Session Id** – This allows you to retrieve session data for a specific session.

**Local Storage Monitor** – This allows you to see which sessions are in queue to be downloaded and to see when the application will make the first attempt to download the data file.

**Add Portal** – This allows you to add and enter details for a new portal.

**Delete Portal** – This allows you to delete the currently selected portal.

**Get Sessions for Date/Time Range** – This allows you to retrieve sessions for a specified time period. You do not need to be actively logged on, since the logon process will be performed during the on-demand update.

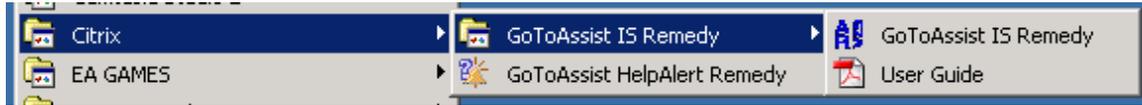
**Schedule** – This allows you to assign scheduled times for sessions to be captured in bulk (batch mode). You do not need to be actively logged on, since the logon process will be performed during the scheduled update.

**Cancel** – This closes the window but leave the GoToAssist Integration Services Remedy Service running (for Real Time and Scheduled Updates).

**Quit** – This ends the GoToAssist Integration Services Remedy Client and stops the service.

To launch the GoToAssist Remedy Service Client for the first time, go to the **Windows Start Menu** and select:

**Citrix -> GoToAssist IS Remedy -> GoToAssist IS Remedy**



When the Remedy Client is selected from the **Windows Start Menu** for the first time, you will be prompted by the dialog shown below to enter information for your portal.

- **Portal Nickname** - This is the common name of your portal (choose any name you want) and is displayed on the tab in the Remedy Client.
- **Update Interval (Seconds)** - The amount of time, in seconds, between each poll to the GoToAssist Web Service broker, when updating in real time. *Default interval is 10 seconds.*
- **Username** - This is the username assigned by your GoToAssist account manager to login to your GoToAssist Portal.

**Note:** Make sure you have administrative logins to the GoToAssist Broker to access your portals. This is a different login than the Management Center login and is set up internally by Citrix Online. The login can only be used ONCE per instance of access to the Broker.

- **Password** - This is the password assigned to you by your account manager to login to the GoToAssist Portal.

**Note:** If you enter wrong credentials and attempt to log on three (3) times, the system will lock you out for five (5) minutes. After 10 failed logins, you will be locked out permanently if hard lockouts are enabled for your portal.

- **Start Update at start-up** - When checked, the Remedy Client will start real time updates on this portal whenever the service is started.

**Note:** Real time updates will only capture session data that occurs while the service is running in updating mode. It will not retrieve any sessions from the past. Please use On-Demand capturing for this purpose.

 A screenshot of the 'GoToAssist IS Remedy Preferences' dialog box. The 'Settings' tab is selected. The dialog contains the following fields and options:
 

- Portal Nickname: [Empty text box]
- Update Interval (Seconds): [10]
- Username: [Empty text box]
- Password: [Empty text box]
- Start Update at start-up

 At the bottom, there are three buttons: 'Cancel', 'Apply', and 'OK'.

### Configure Local Storage

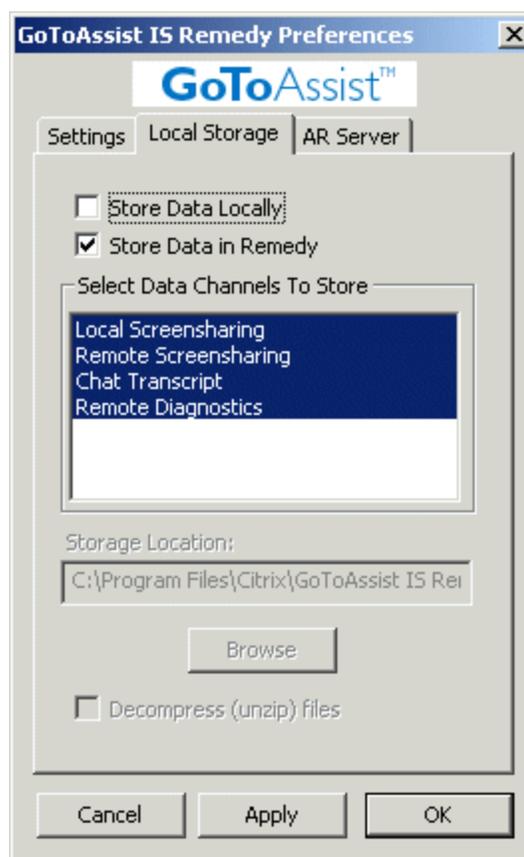
The Remedy Client allows you to capture session data files for storage in a local or network mapped drive for later review. To enable this, select **Preferences** for the portal, then click the **Local Storage Tab** to get the dialog shown below.

- **Store Data Locally** - This enables the local storage of data in a local directory
- **Store Data in Remedy** - This enables the local storage of data in the AR System (in the **Review** tab of the GoToAssist:Session form)
- **Data Channels to Store** - This chooses which data channels you wish to download and store. Selections are: Local Screensharing, Remote Screensharing, Chat Transcript, and Remote Diagnostics
- **Storage Location** - If the **Store Data Locally** box is checked, then you can specify the drive or network path where you wish to store the files. By default it is stored in the sub-directory **Sessions**

**Note:** Use a local drive or full network path. Since this is a service, the user settings such as network mapped drives may not be known.

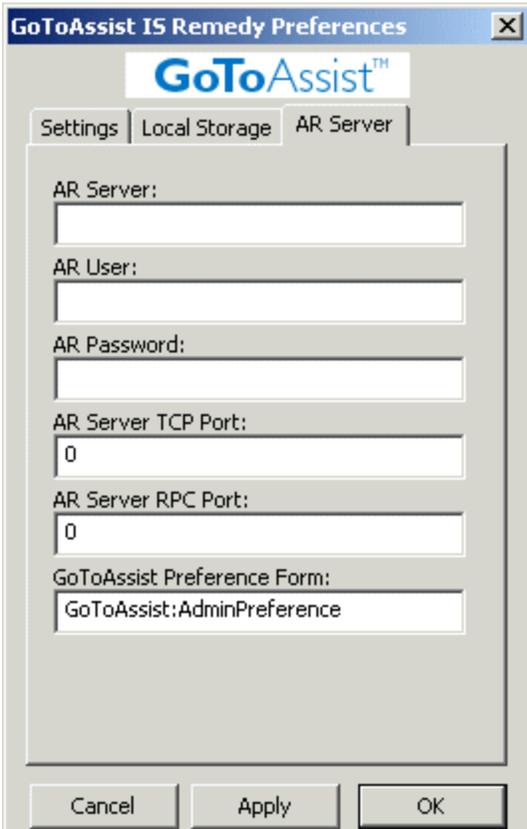
- **Decompress (unzip) files** - The locally stored data is normally stored in zip files. Each file is named with the unique Session ID as follows: **Session\_<sessionId>.zip** Selecting this option will automatically unzip this file into its individual parts. The zip file is deleted when using this option.

**Note:** You may want to unzip the files to take advantage of the ability to use command line arguments to display the files. (For more information, refer to the section in this manual that describes the **Command Line Arguments**.) If you have a security key defined, this will be preserved (i.e. they key will be requested on each data channel file before a user can view it).



### Specify AR System Server

The Remedy AR System server must be specified to allow you to capture the GoToAssist session data into the AR System forms of that server. To enable this, select **Preferences** for the portal, then click the **AR Server Tab** to get the dialog shown below.

<ul style="list-style-type: none"> <li>• <b>AR Server</b> - This specifies the host name or IP address of the Remedy AR System server.</li> <li>• <b>AR User</b> - This is the AR System administrator login to the AR System server. The login must have change permissions to the GoToAssist session forms.</li> <li>• <b>AR Password</b> - This is the AR System password for the AR User specified above.</li> <li>• <b>AR Server TCP Port</b> - This is the TCP port number that represents the port number of the AR System server.</li> <li>• <b>AR Server RCP Port</b> - This is the RPC (Remote Procedure Call) number that represents the program number of the specified AR System server, and enables you to connect to a private server</li> <li>• <b>GoToAssist Preference Form</b> - This is the GoToAssist administrator preferences form that specifies all of the GoToAssist forms and the AR System application integration form.</li> </ul>	
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Additional options, such as Service Dependencies and Proxy Service can also be specified. See the manual for configuring these options.

At this point, you may run the GoToAssist Remedy IS Client to write the GoToAssist data into the fields of the GoToAssist session forms. If you wish to associate the **GoToAssist:Session** form with an AR System application, continue to follow the directions below.

## GoToAssist Remedy Application Integration

### Creating GoToAssist fields on AR System Forms

Copy the hidden fields on the **GoToAssist:AdminPreference** form onto your AR System application form. Examples below show the Remedy Help Desk form (**HPD:HelpDesk**) and the Remedy CSS Customer Support form (**SPRT:Issue**).

It is important that you create the GoToAssist fields on your AR System application form first before importing (or creating) the application integration workflow.

**Note:** Since the fields you copied from the **GoToAssist:AdminPreference** form were hidden you will need to be sure to uncheck the "Hide" box for the non temporary field. **Note:** For Remedy CSS Customer Support, you must also create a **Work Log** diary field for GoToAssist for progress information.

### Remedy Help Desk Form

### Remedy Customer Service and Support Form

## Importing/Creating the AR System Application Workflow

The GoToAssist Session forms can be associated with Remedy Help Desk, Remedy CSS (Customer Support) or any customer AR System application. You can import the associated workflow for installed AR System applications or follow directions in the manual to create workflow if you have a custom AR System application.

Use Remedy Administrator and select the desired workflow file located in the subdirectory:

**Citrix\GoToAssist IS Remedy\Workflow**

- **For Remedy Help Desk: GoToAssist\_RemedyHelpDesk.def**
- **For Remedy CSS Customer Support: GoToAssist\_RemedyCSS.def**

At this point, you may run the GoToAssist Remedy IS Client to write the GoToAssist data into the fields of the GoToAssist session forms and associate the **GoToAssist:Session** requests with your AR System application. Newly created **GoToAssist:Session** requests will create an associated AR System trouble ticket. If you wish to also add the Remedy Agent integration, continue to follow the directions below

## GoToAssist Remedy Agent Integration

### Installing the Remedy Agent Integration Application

Follow the directions to install the **G2AHARemedy\_Setup.exe**. This installation procedure will install an application called **GoToAssistHelpAlertRemedy.exe** in the user's AR System User directory (where **aruser.exe** is located) and create a new item in the Remedy Agent's Start Menu called **GoToAssist HelpAlert Remedy**. The agent will then use this executable to log into Remedy User and into the GoToAssist integration with the AR System.

*Configuring the Agent's GoToAssist Remedy HelpAlert Application*

To launch Remedy Service Client for the first time, go to the **Windows Start Menu** and select:

**Citrix -> GoToAssist HelpAlert Remedy**

When the GoToAssist HelpAlert Remedy application is launched, you will be prompted by the dialogs, shown below, to enter information for your Remedy HelpAlert Integration.

- **Remedy Username** - This is the login name for your Remedy AR System server (i.e. the login you use with the Remedy User Client).
- **Remedy Password** - This is the password assigned to the Remedy Username to access Remedy AR System server (i.e. the password you use with the Remedy User Client).
- **Remedy Server** - This is the Remedy AR System server you are accessing.

**Note:** This login will attempt to also log you into your GoToAssist HelpAlert logins as defined in the **GoToAssist:Representative** form. The AR System password you enter here will be tried first as the password for your HelpAlert logins. If this password is incorrect, you will be prompted for your GoToAssist HelpAlert password.

**Note:** The last entries of these values (except **Password**) are stored in the registry as default values.

**The Advanced Button displays:**

- **Preference Form** - This is the GoToAssist administrator preferences form that specifies all of the GoToAssist forms and the AR System application integration form. Your administrator will let you know the name of this form. By default it is:  
**GoToAssist:AdminPreference**
- **AR Server TCP Port** - This is the TCP port number that represents the port number of the AR System server.
- **AR Server RCP Port** - This is the RPC (Remote Procedure Call) number that represents the program number of the specified AR System server, and enables you to connect to a private server.
- **Show GoToAssist Question Queue(s) (Web Mode)** - This indicates that you would like to always show the GoToAssist HelpAlert Queue for all Web Mode logins. It is not necessary to view the HelpAlert queues during the integration support.

## Defining AR System Representative GoToAssist Logins

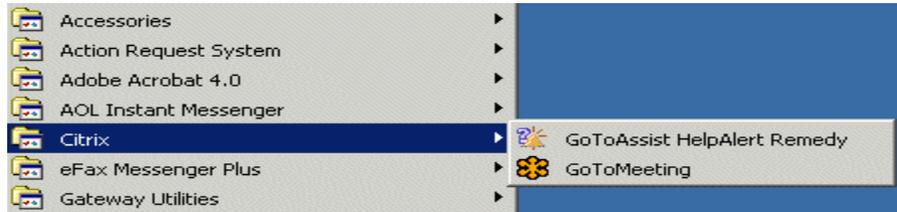
The **GoToAssist:Representative** form contains information about the support agents who will be using the Agent Side Remedy Integration. It is used as the reference form for agents to log into their respective HelpAlert logins when they log into **Remedy User**, using the GoToAssist HelpAlert Remedy Agent application. The data should be maintained by the Remedy Administrator.

- **Remedy Login Name** - This is the username the agent uses to login to **Remedy User**.
- **GoToAssist Login (Email)** - This is the email address the agent uses to login to **GoToAssist HelpAlert**.
- **Portal Type** - This is the type of GoToAssist portal referred to by the email login.

**Note:** An agent may have multiple GoToAssist logins for different portals. This form should contain all the login information so that when the agent logs into **Remedy User** via the **GoToAssist HelpAlert Remedy Application**, he/she will be also be logged into each of the assigned GoToAssist HelpAlert logins as well.

## Sample Scenario

To start the GoToAssist HelpAlert Integration using Web Mode, the agent logs into the Remedy Application via the **GoToAssist HelpAlert Remedy** application:



The agent launches this application and enters his AR System login information.



He enters his password and then selects **OK**. He is then logged onto the Remedy AR System server via **Remedy User** and also logged onto all of his **GoToAssist HelpAlert** logins.

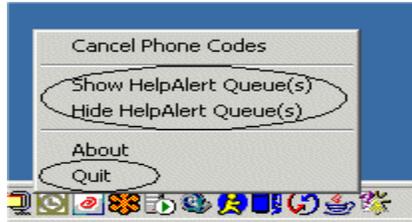
Upon login, the Remedy User client displays the **GoToAssist Home Page**



The agent also sees the **GoToAssist HelpAlert Remedy** icon in the system tray.



The agent can view or hide the HelpAlert interface by right-clicking the mouse on the **GoToAssist HelpAlert Remedy** icon



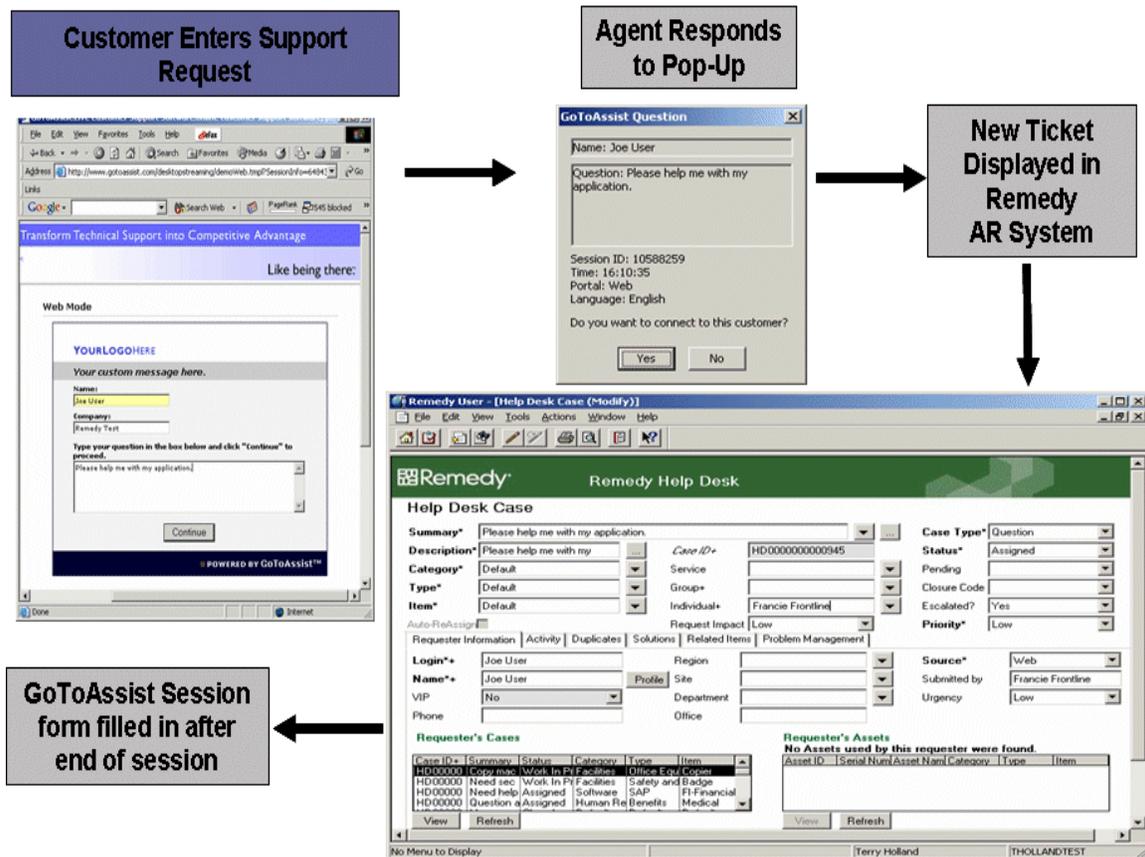
If the agent is using phone mode, he can optionally cancel any outstanding phone mode codes he may have created anywhere using his account.

Agents can use both modes of GoToAssist HelpAlert: **Web Mode** (customers request support through SmartBox entries) or **Phone Mode** (customers connect with the agent using a phone mode code generated by the agent). The integration with The AR System is seamless:

**Web Mode:** When the agent accepts the customer request to connect via GoToAssist, a support ticket is instantly created with the fields of the form filled in with the values entered in the SmartBox by the customer (such as customer name, company name and question). The agent supports the customer using the Remedy Help Desk support form.

**Note:** SmartBoxes are fields on the hosted website where the customer enters information to request a GoToAssist support session.

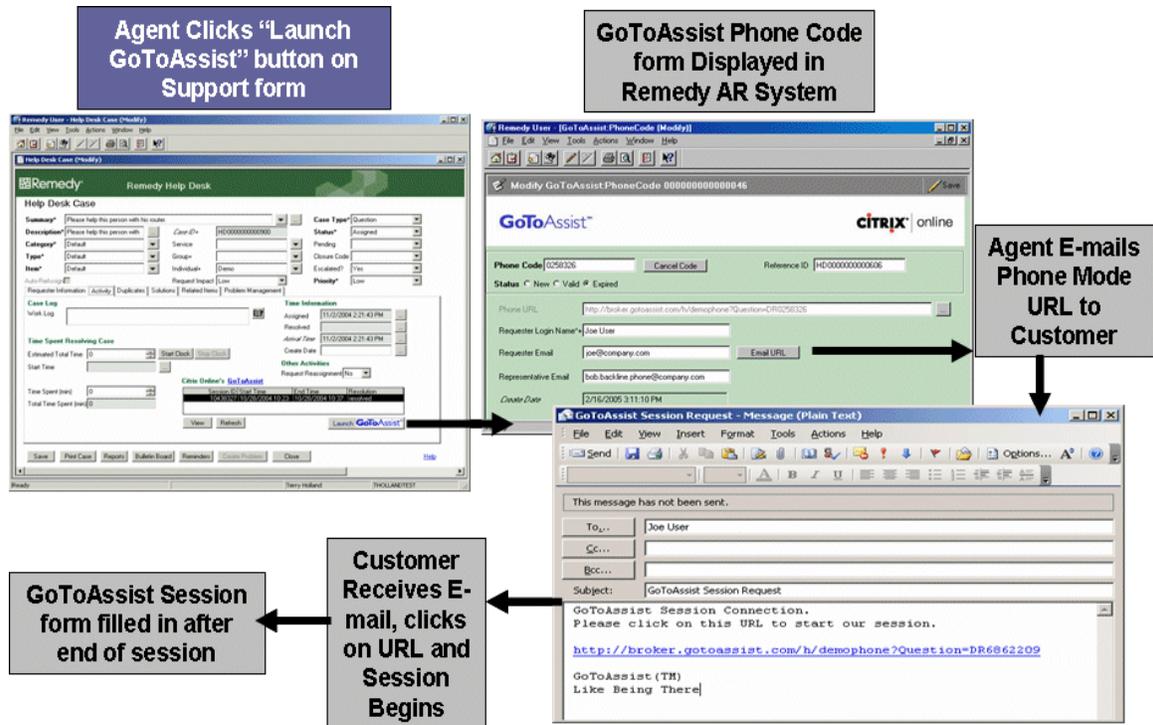
The Web Mode works like this:



This example shows the **Remedy Help Desk** ticket as the support form. Note that any AR System form could be used.

**Phone Mode:** The agent can click a button on the AR System support form to initiate a phone mode code. An AR System form is instantly displayed with the required Phone Mode Code and URL. The agent can optionally e-mail the URL to the customer for easy session initiation.

The Phone Mode works like this:



This example shows the **Remedy Help Desk** ticket as the support form, but any AR System form could be used.

The agent can review the GoToAssist session information by selecting highlighting the **GoToAssist:Session** request and selecting the **View** button.

Especially valuable is the Remote Diagnostics feature. During the GoToAssist session, the agent can request Remote Diagnostics from the customer. Upon capture of this information, the Remote Diagnostics information is instantly captured into the **GoToAssist:Session** form.

Below is an example of an associated GoToAssist session:

The **Request** tab displays all the information about the customer's support request and the agent who responded to the request. The request tab shows the portal where the customer posted the question, the question, the time the question was posted, the response time and all the SmartBoxes entry values. If this session was transferred from or to another session, it will be displayed here.

The screenshot shows the 'Modify GoToAssist:Session' interface. At the top, there is a menu bar (File, Edit, View, Tools, Actions, Window, Help) and a toolbar. The main content area is titled 'Modify GoToAssist:Session 00000000000301' and features the GoToAssist and Citrix Online logos. Below the logos, there are input fields for 'Session ID' (12012692) and 'Reference ID' (HD0000000000303). A 'Status' section has radio buttons for 'New', 'In Session', 'Finished' (selected), and 'Error', along with a 'Ticket Details' button. The 'Request' tab is active, showing a 'Portal' dropdown set to 'GoToAssist Demo - Web Mode' and a 'Question' text area containing 'Please help me with my application.' Below this are several pairs of input fields: 'Post time' (1/25/2005 8:07:29 AM) and 'Rep Name' (Bob Backline); 'Response Time' (1/25/2005 8:07:33 AM) and 'Rep Screen Name' (Bob); 'Representative' (bob.backline@remedy.com) and 'Team Name' (Client Demo); 'Transferred From' and 'Rep IP' (10.1.21.165); and 'Transferred To' and 'Customer IP' (10.1.21.178). At the bottom, a 'Smart Box Entries' table is displayed with two rows: 'Name' with value 'Joe User' and 'Company' with value 'Remedy'. The status bar at the very bottom indicates '2 entries returned - 2 entries matched', 'Demo', and 'THOLLANDTE'.

The **Session** tab displays the details about the session. These details are the start time, end time and duration (in minutes), the resolution (entered by the agent), the locale (this value may be blank if the locale is set to a default, such as English), the results of any reboot/reconnect of the customer's system, any session end label and data entered by the agent (such as a ticket number referring to another call tracking system) and the customer's and representative's ratings of the session.

**Modify GoToAssist:Session 00000000000301** Save

**GoToAssist™** **CITRIX® online**

Session ID: 12012692 Reference ID: HD0000000000303

Status:  New  In Session  Finished  Error Ticket Details

Request | **Session** | Review

Start Time: 1/25/2005 8:07:56 AM Resolution: resolved

End Time: 1/25/2005 8:10:51 AM Locale:

Duration: 3

Reboot/Reconnect:  No  Successful  Reconnect Failed

Session End Label: Case ID Number Session End Data:

Customer Rating

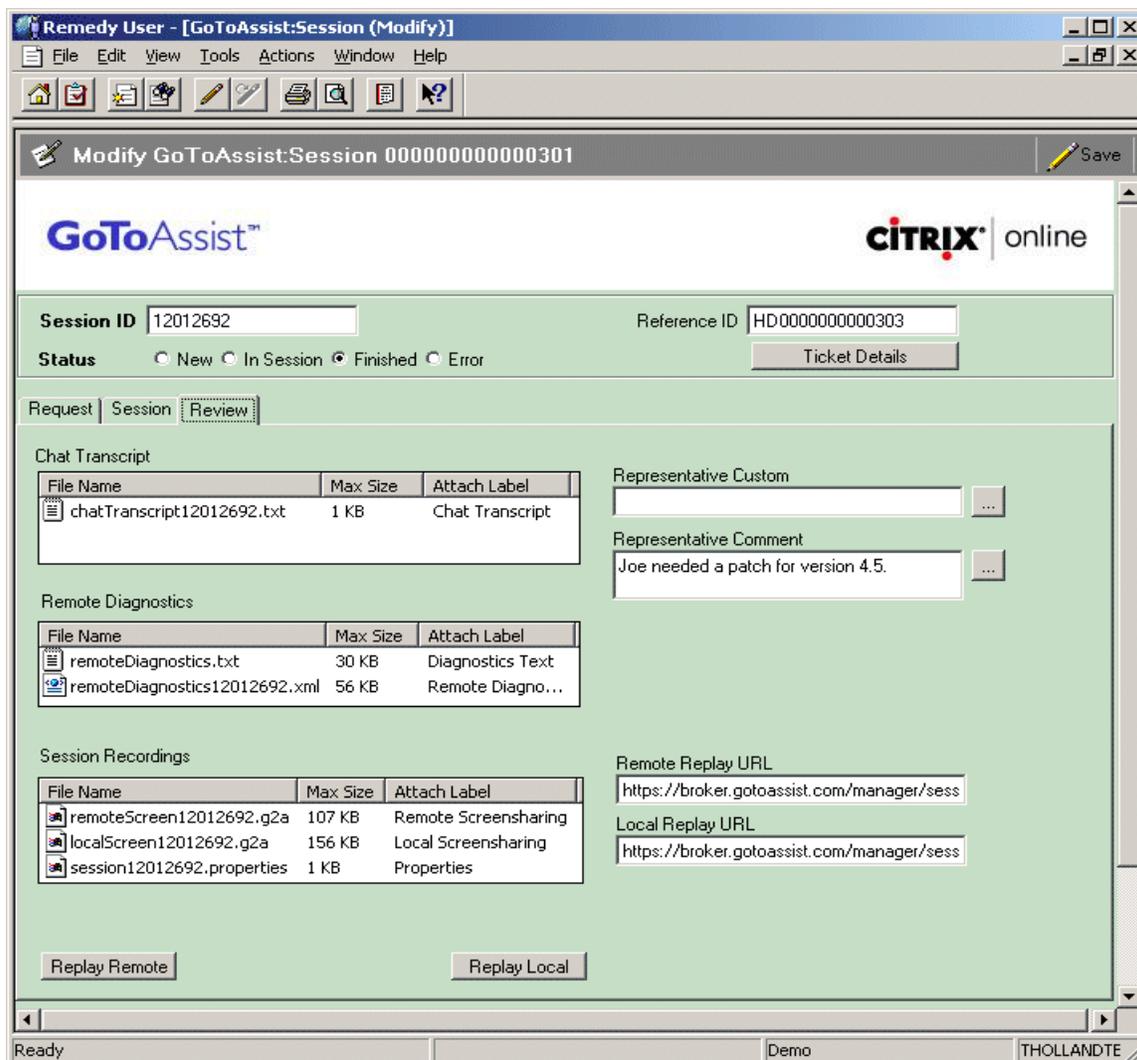
Label	Value
How was your experience with \$Nickname?	Positive
null	Everything's working great now!
null	Thanks for the excellent support.

Representative Rating

Label	Value
Do you feel satisfied with the outcome?	I am pleased with the outcome.
What was the session outcome?	Resolved

2 entries returned - 2 entries matched Demo THOLLANDTE

The **Review** tab allows the agent to review the entire session. The agent can review the chat transcript, the remote diagnostics (both in text form and in xml form) and replay the screen sharing session recordings -- the local (agent's desktop) and the remote (customer's desktop). If the session recordings are not saved within the AR System form, they can be replayed directly from the **GoToAssist Management Center** by selecting the respective URLs.



## Endnotes

Citrix Online LLC and BMC produced this integration note to assist customers with joint BMC / Citrix Online LLC implementations. BMC and Citrix Online LLC have made an effort to ensure that the information contained in this document is accurate, but do not guarantee any accuracy now or in the future.

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