

GoToAssist®

GoToAssist Corporate Integration White Paper

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

Integrating GoToAssist Corporate 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.

• www.gotoassist.com

With millions of sessions hosted annually, Citrix® GoToAssist® Corporate 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 Corporate's incident diagnosis, resolution, survey tools and ability to remotely view and control desktops. The hosted GoToAssist Corporate 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 Corporate can be enhanced by integrating with support systems and other applications. This white paper addresses how GoToAssist Corporate works and provides information about available integration options.

Here's how GoToAssist Corporate works:

Step 1: A GoToAssist Corporate session can be initiated by a customer or by a support agent.

Web Mode: The customer goes to a website that hosts a GoToAssist Corporate support portal* and types in a request for either chat-only support or full screen-sharing support. The support request is queued for the next available agent, and the agent begins a remote-support session with the customer. Chat-only sessions can be escalated to full screen-sharing support or transferred to another rep with screen-sharing capabilities.

Phone Mode: Alternatively, the customer can move directly from a phone call with the agent to a remote-support session. To do so, the agent provides the customer 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:

- Two-Way Screen Sharing
- Remote Viewing/Control
- Multiple Sessions
- Multi-Monitor Navigation
- Mac Support
- File Transfer
- Reboot/Reconnect
- Remote Diagnostics
- Chat
- MultiChat
- Session Transfer
- Annotation Tools

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

Integration overview

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

<p>Out-of-Box Packages</p>	<ul style="list-style-type: none"> • Data Replicator
<p>Software Development Kits (SDK)</p>	<ul style="list-style-type: none"> • Customer 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 Data Replicator downloads all of the hosted GoToAssist Corporate session data into a local Microsoft® SQL Server database and saves the session recordings in local directories.

Software Development Kits (SDK)

The End-User Integration Guide provides guidelines, suggestions and examples for integrating a customer's launch request for a GoToAssist Corporate session with a Web site or other application.

The Agent-Side API (Application Programming Interface) calls enable the integration of GoToAssist Corporate HelpAlert™ functionality with an agent's standard set of support tools. HelpAlert is the application used by support agents to manage GoToAssist Corporate 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 customers needing to join GoToAssist Corporate sessions directly.

The Sessions API calls provide the ability to download session data from the GoToAssist Corporate 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.

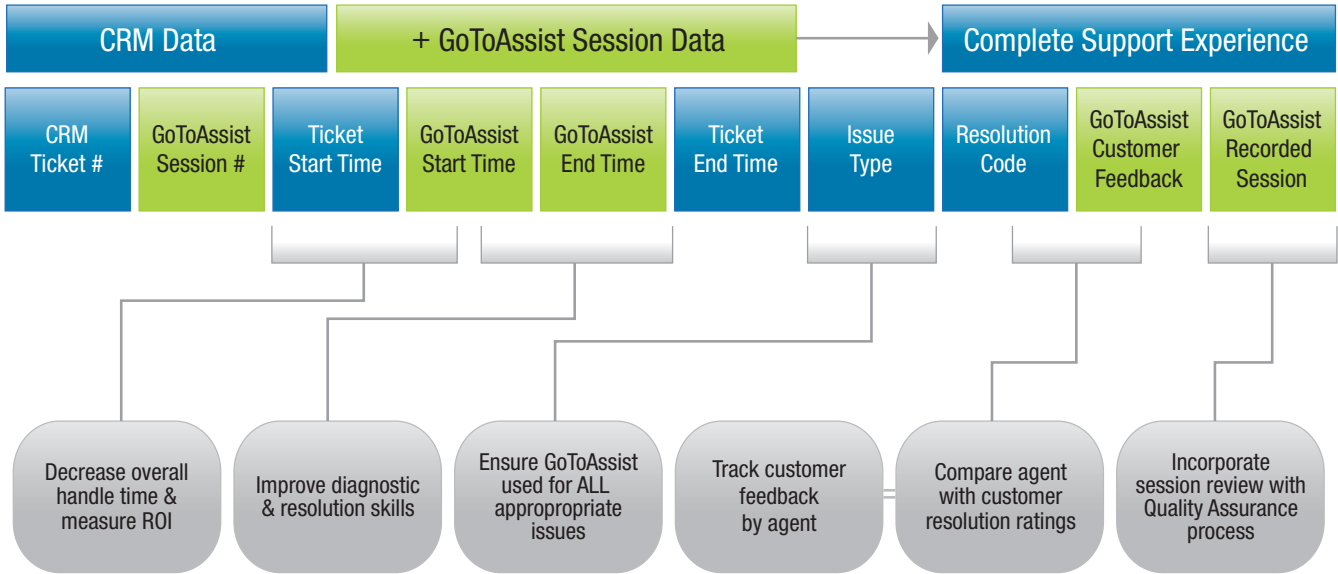
The Monitors API can monitor support agents' GoToAssist Corporate activities, such as the current number of sessions each representative is currently supporting. This enables integration with Automated Call Distribution (ACD) systems, tracking systems and other applications.

The value of integration

Integration’s primary value is to optimize the support environment for customers, agents and managers. Here are a just a few of the many ways that a GoToAssist Corporate integration can bring additional value to a GoToAssist Corporate deployment:

- **Making it easy** for customers 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 valuable information for determining when support agents should use GoToAssist Corporate. 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 retention 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 Corporate 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 Corporate:

End-User (or Customer) Integration: GoToAssist Corporate can be configured in a number of ways. One way is to have customers access a web form to enter their request. This manual step can then be bypassed through integration. Integrating the launch of the GoToAssist Corporate session enables customers to easily request and initiate a session request directly from a website or other customer-facing application. Providing customers 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 Corporate sessions from within their primary support applications. The ability to instantly accept or launch a session, email a GoToAssist Corporate connection code or merge incoming GoToAssist Corporate 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 Corporate. This is a client-side integration that works on a per-agent basis.

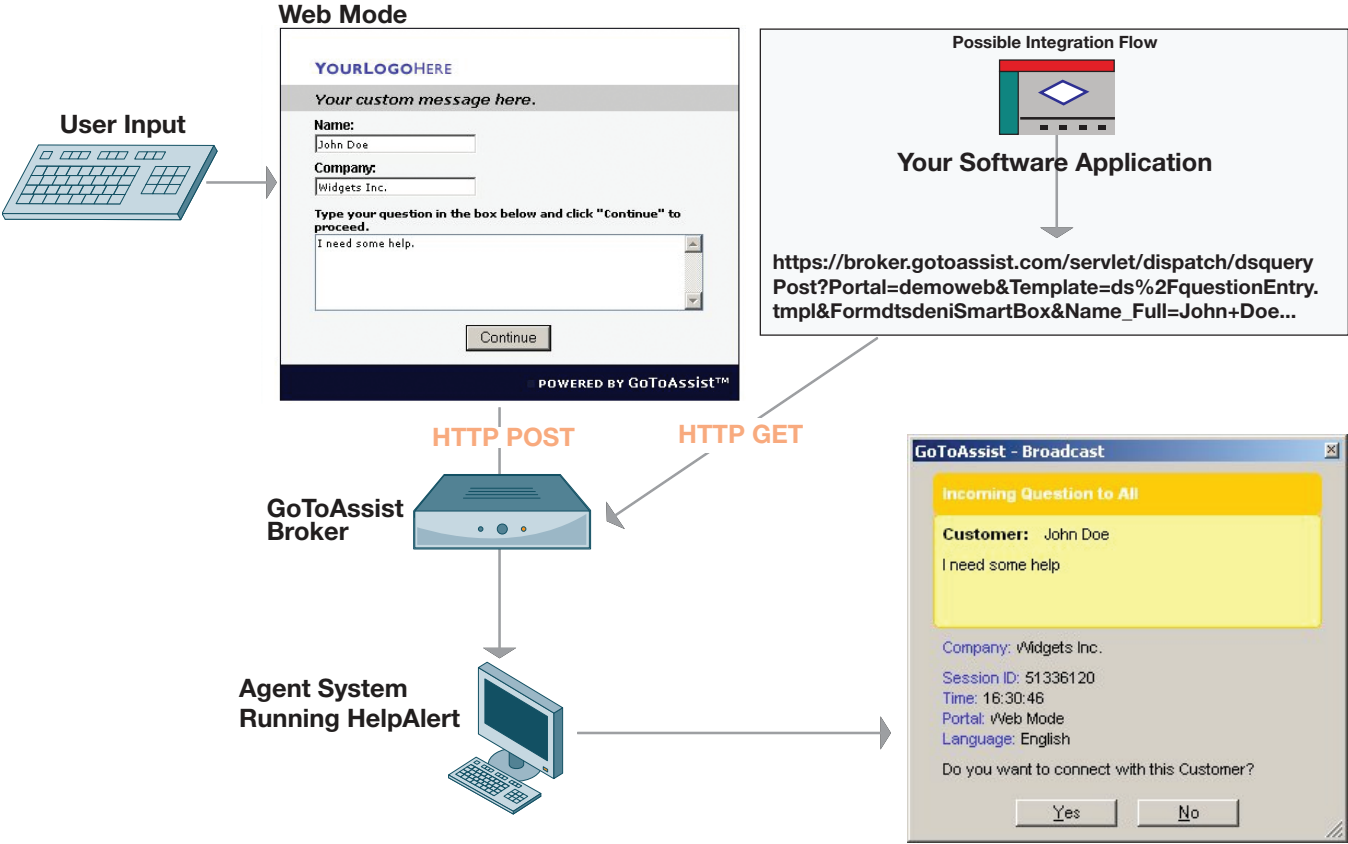
Data Integration: All the GoToAssist Corporate session data, such as survey results, chat transcripts and session recordings, can be automatically stored locally and accessed from within support applications. Managers can review a trouble ticket and all the corresponding GoToAssist Corporate session 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 Corporate 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 Corporate session is through the customer'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 website. This form can be configured with required and/or optional fields for customers to fill out to launch the GoToAssist Corporate request.

Creating an automated method for quickly launching a GoToAssist Corporate session request can greatly improve the support experience for customers 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 Corporate support request, can be easily created programmatically or via a script and launched without requiring an customer 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 customer, The ability to launch GoToAssist Corporate automatically for the customer end user does not require API calls.



For more information: Contact Citrix Online to request the GoToAssist Corporate End-User Integration Guide, which provides examples and advice about how to embed the GoToAssist Corporate launch request into a website or other application.

Benefits of end-user integration include:

Automate launch: Scripts or applications can be created to automatically enter required information into the GoToAssist Corporate support-request form so that customers do not need to manually enter known information. This streamlines the process for requesting remote support.

Capture system or application information: Information from the customer's system, such as a unique system identifier, for example, can be passed into fields unseen by the customer during the submission of a GoToAssist Corporate support request. Similarly, valuable information from a customer's application, such as the customer account number, can be seamlessly passed into a GoToAssist Corporate session request. This eliminates the need for customers to re-enter information and ensures information accuracy. Upon responding to the GoToAssist Corporate request, support agents are presented with helpful and accurate information about the customer.

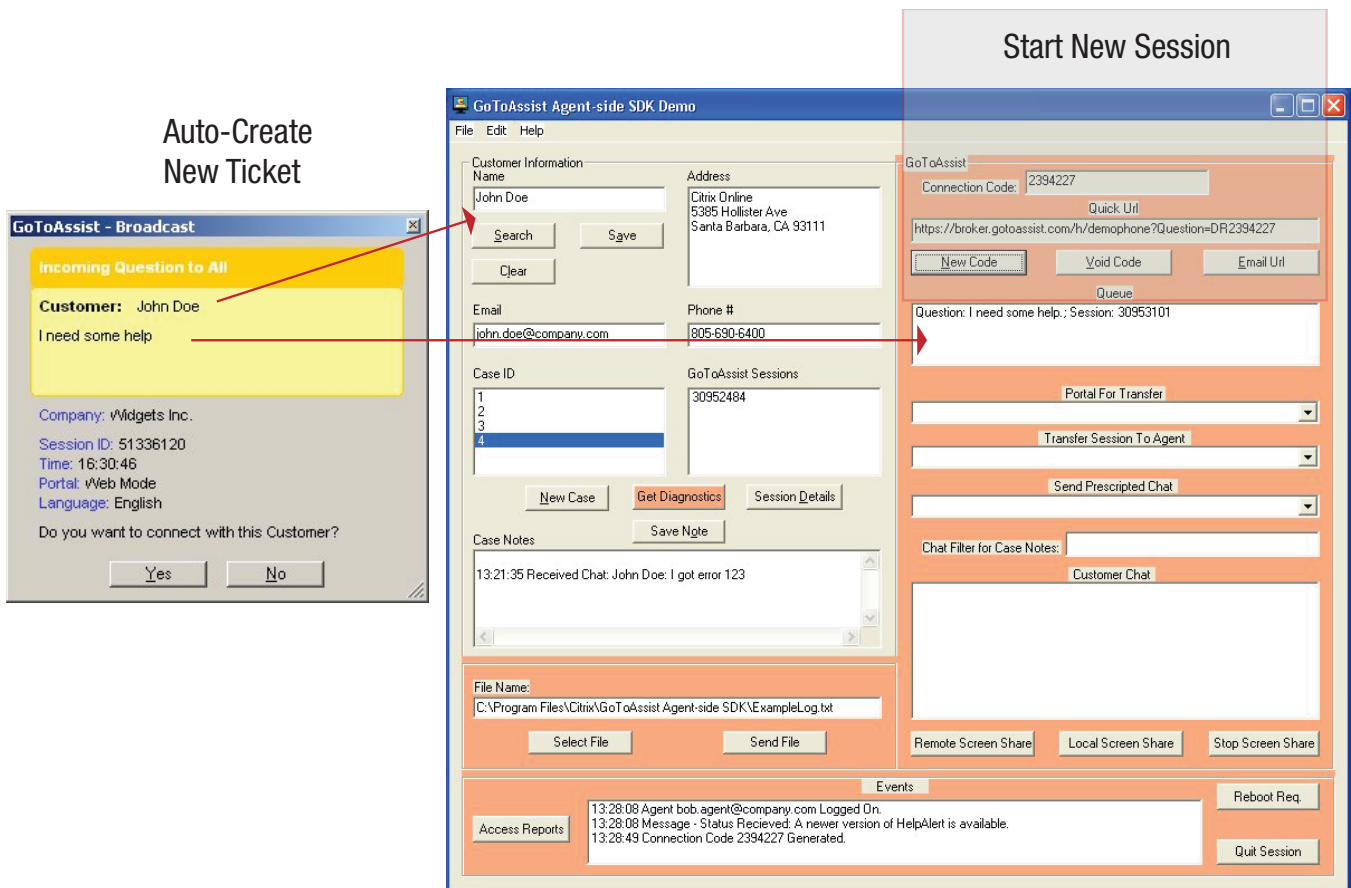
Skills-based routing: One way to implement skills-based routing is through end-user integration. GoToAssist Corporate portals (e.g., support queues) can be configured with multiple sub-portals. Each sub-portal can represent a skill set. Support agents, logged in to one or more sub-portals, receive the support requests routed to the sub-portals to which they belong. A front-end application that determines the customer's end-user requirement can be enhanced to automatically send the GoToAssist Corporate request to the appropriate sub-portal so that the agent with the appropriate skill or experience supports the end-user request.

Agent-side integration

GoToAssist Corporate 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 Corporate.

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 Corporate functions. Examples include launching a new GoToAssist Corporate session from within a CRM interface and automatically capturing and storing incoming GoToAssist Corporate request information into a trouble ticket.



Integrate GoToAssist Corporate with a Ticketing System:

- Automatically create a new ticket from an Incoming GoToAssist request.
- Start a new session from within the CRM.

The **GoToAssist Corporate 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 Corporate 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 **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 Corporate 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.

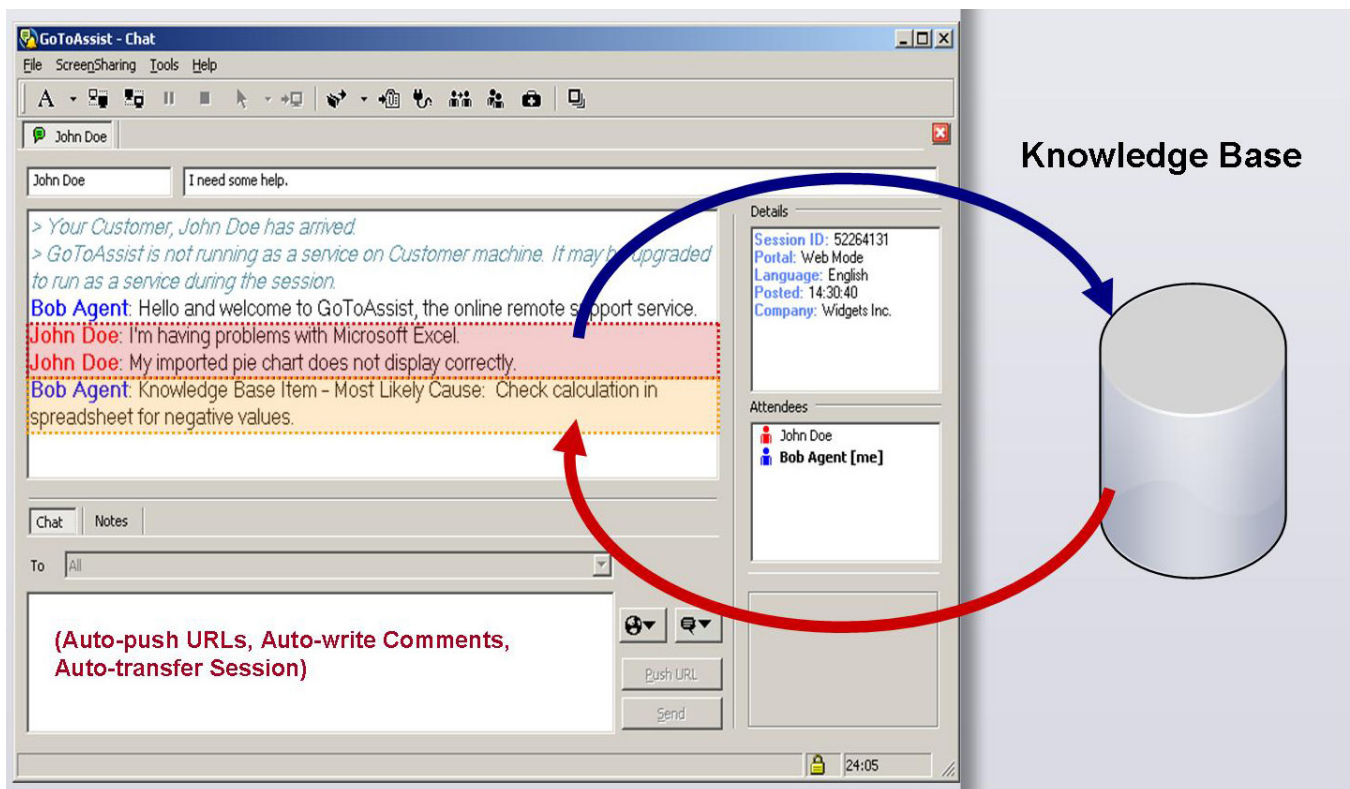
The **Phone Mode API** is an additional option for integrating GoToAssist Corporate Phone Mode functionality with web browser support applications. Using Web Services API calls, agents can generate and cancel GoToAssist Corporate connection codes from within the interface of their web-based application.

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 Corporate session. This unique identifier is then stored along with the rest of the GoToAssist Corporate session data. Later retrieval of the hosted GoToAssist Corporate 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 Corporate 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.

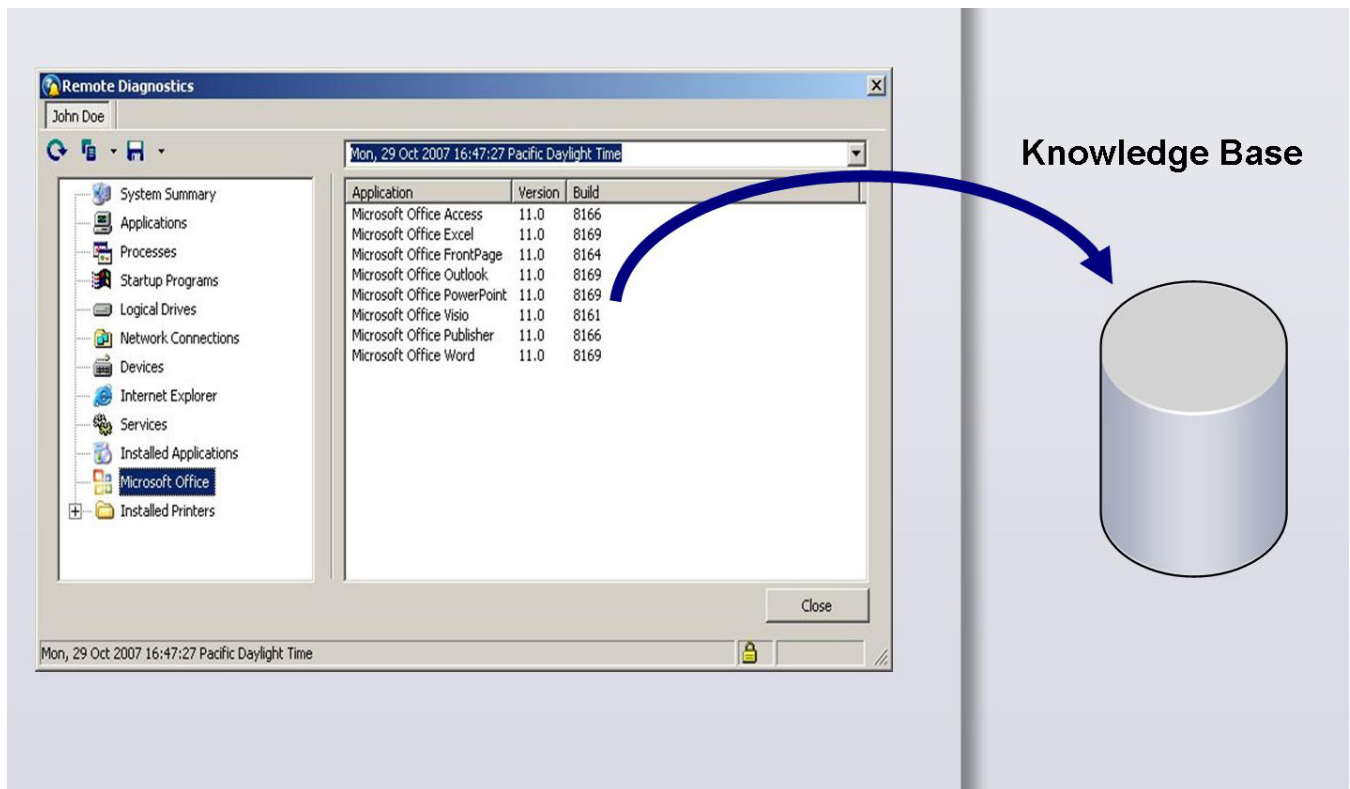
An example of knowledge base integration is illustrated below. The agent receives chat from the customer who describes a problem with an application. The chat transcript is automatically captured during the session and entered into a knowledge base. A potential solution is found and presented to the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



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 Corporate to receive remote diagnostics from a customer, the information can be automatically captured and entered into a knowledge base that checks and verifies the version numbers of installed applications. If the customer 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 customer by automatically pushing a URL or automatically sending a file via GoToAssist Corporate.



For more information: Contact Citrix Online to request the **GoToAssist Corporate 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.

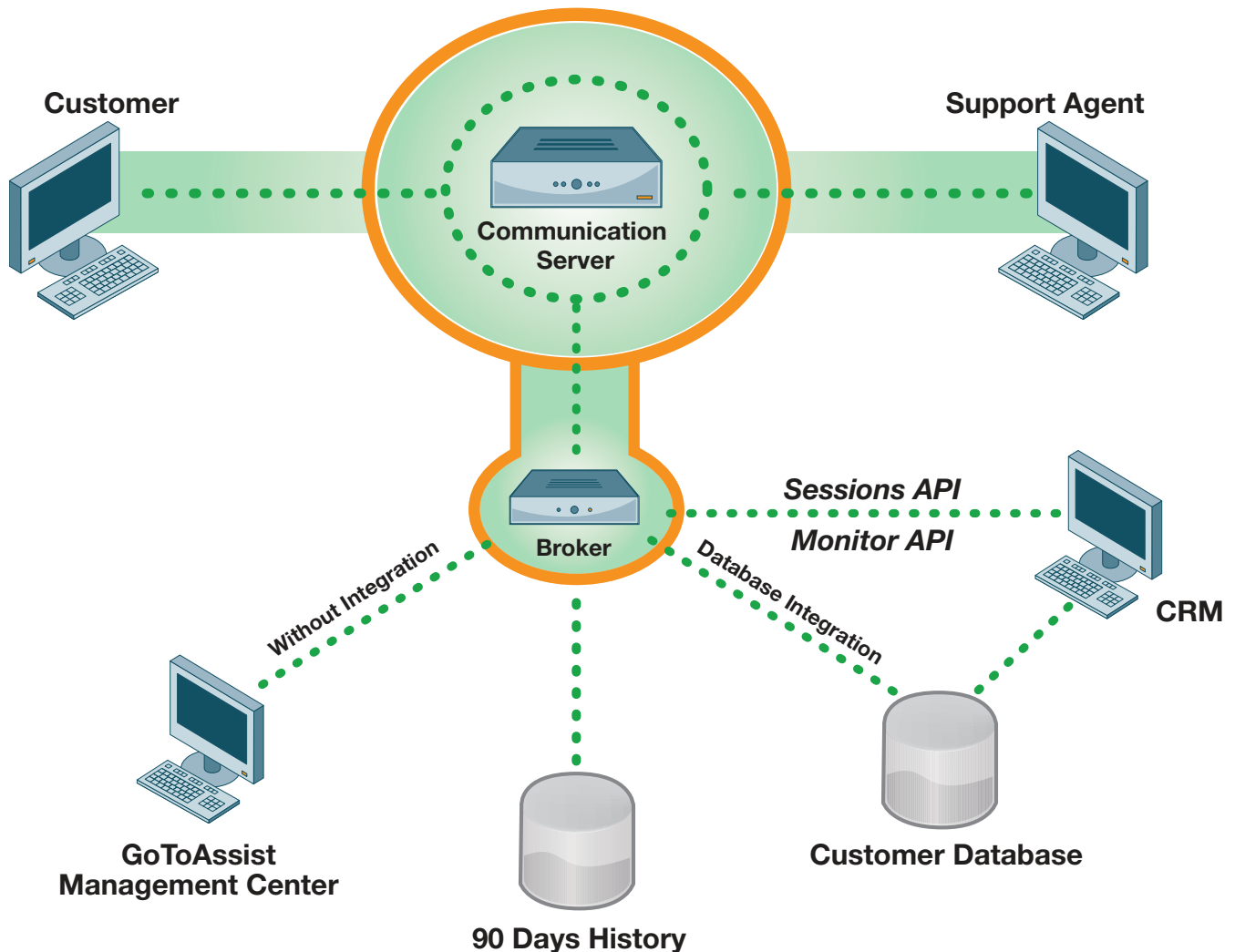
Automate Diagnostic Functions:

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

Data integration and replication

GoToAssist Corporate 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 the time of manually documenting each call. Saving and merging GoToAssist Corporate 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 Corporate sessions can also be downloaded. This agent availability data can be integrated with queuing systems to more efficiently route customer support requests.

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



Data Integration:

- Develop program to access data and write directly into application via Sessions API.
- Download into local database using the GoToAssist Data Replicator™.

Agent Status Data:

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

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

- Develop a program using the **Sessions API** to access hosted session data and write it into an application, such as a CRM system; or
- Deploy the out-of-box **GoToAssist Data Replicator** 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.
- Develop a program using the **Monitors API** calls to obtain the status of agents in session and requests waiting in a queue.

Sessions integration

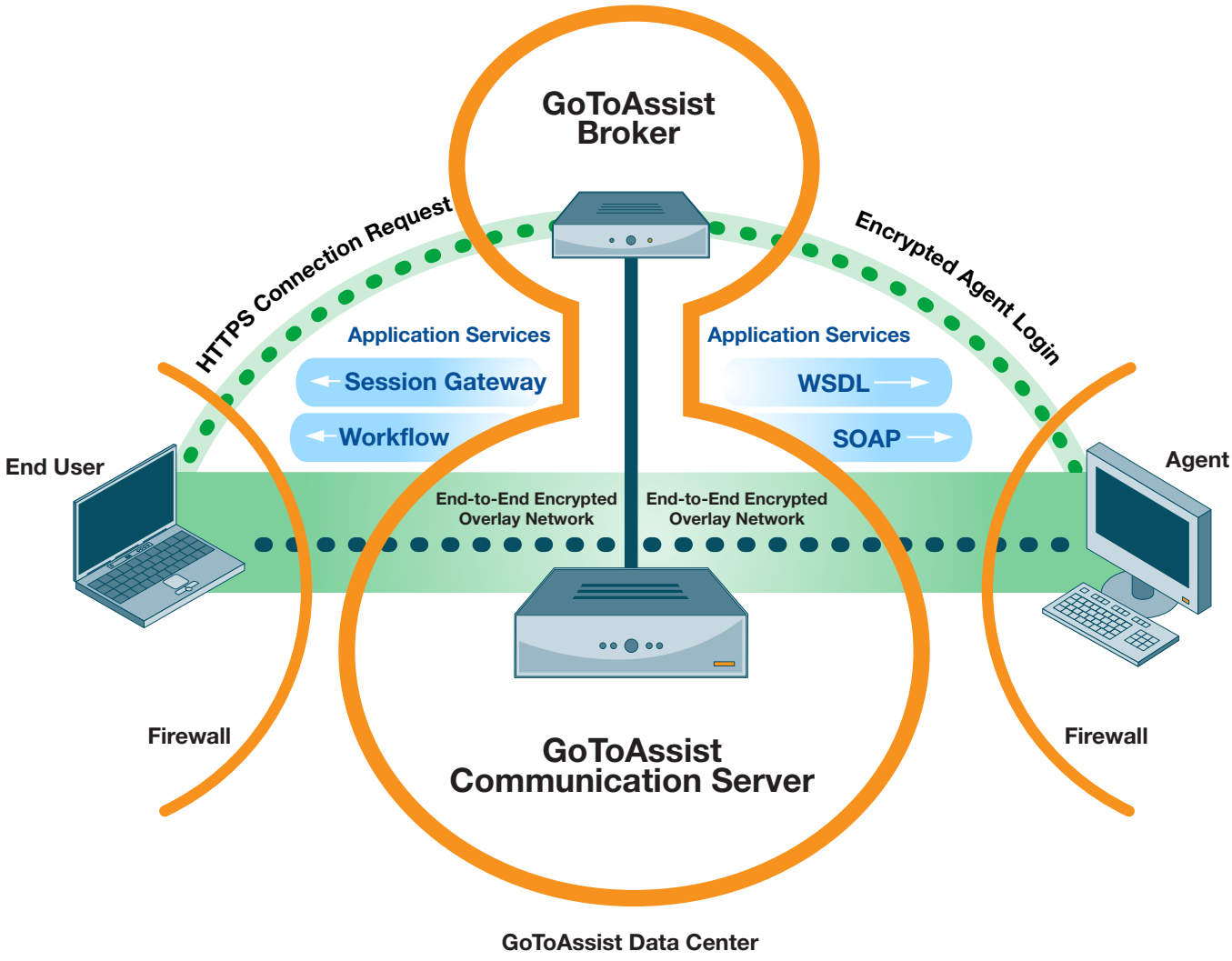
The GoToAssist Corporate Sessions API provides programmatic access to GoToAssist Corporate session data using standard web services technologies, including HTTPS, XML, SOAP and WSDL.

The Sessions API provides access to session data from the GoToAssist Corporate service. This data can be then stored into other systems (such as CRM systems and databases) within the existing support infrastructure. The API provides access to all GoToAssist Corporate session data using the most secure access methods (SSL). An easy-to-use integration toolkit contains the APIs and documentation, along with sample code.

Examples of GoToAssist Corporate session data that can be accessed include:

- Agent identifier
- GoToAssist Corporate Session ID reference
- Entry portal information (point of session origination)
- Session start and end time
- Session duration
- Required fields captured in the GoToAssist Corporate portal
- Session events (such as files transferred and chat log)
- Session resolution (e.g., resolved/unresolved)
- Session rating and feedback by customer
- Session recording files
- Link to unique digital session replay in the GoToAssist Corporate Management Center

GoToAssist Communication Architecture



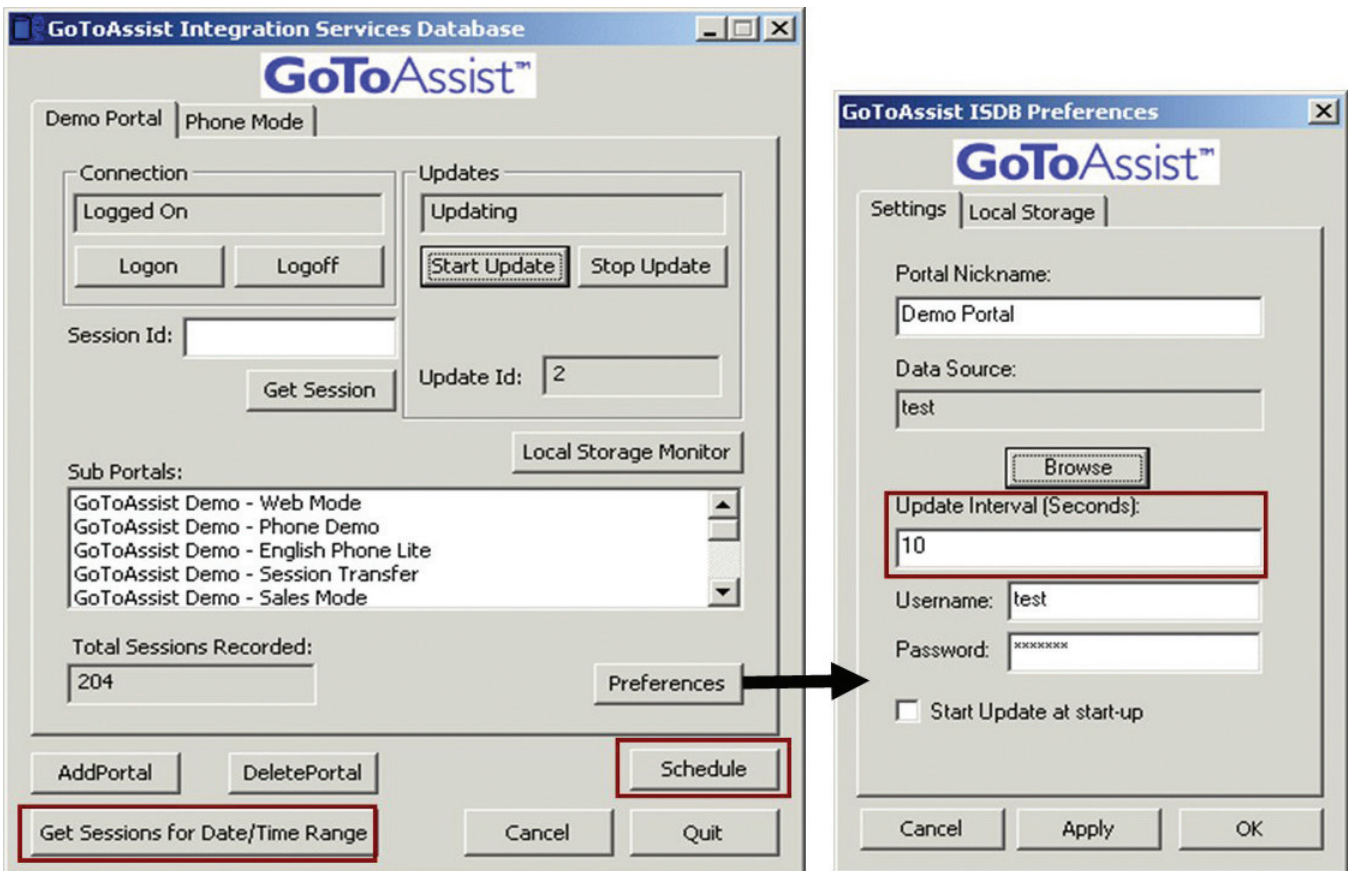
For more information: Contact Citrix Online to request the GoToAssist Corporate End-User Integration Guide.

The Sessions API can also be used to trigger events and automatic notifications based on GoToAssist Corporate session details. For example, in the event that a customer provides a positive or negative rating on a support session, a manager can immediately be notified.

Data Replicator

The **GoToAssist Corporate Data Replicator** is an out-of-box option that pulls all GoToAssist Corporate session data and downloads it into designated local databases. This package is easy to install – most customers have it up and running in less than 30 minutes. The Replicator consists of two user-friendly interfaces:

- Session viewer: Allows the user to view locally stored session recordings, chat transcript and remote diagnostics.
- Configuration manager: Sets up and manages all settings and profiles.



The GoToAssist Data Replicator 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 Corporate session data. Scripts and instructions are provided for Microsoft® SQL Server. ODBC (Open Database Connectivity) is used to write the downloaded data into the database.

Storing GoToAssist Corporate 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 Corporate session data locally provides greater flexibility for integration, long-term storage and security.

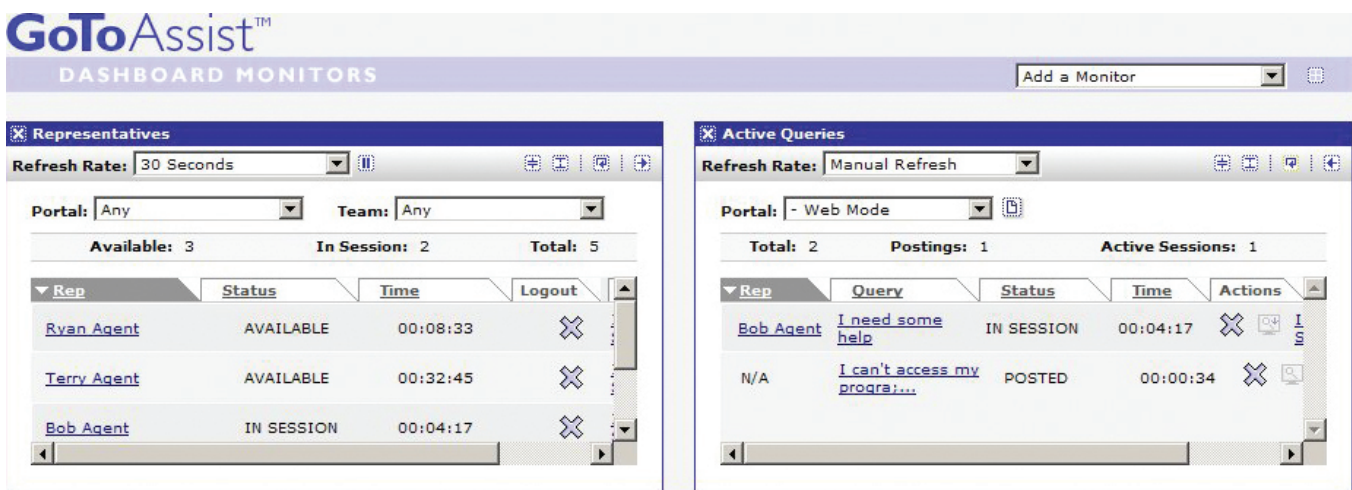
For more information: Contact Citrix Online to request the GoToAssist Corporate Database Integration Package.

Monitors Integration

The GoToAssist Corporate hosted system can be polled in real time to determine which agents are in a GoToAssist Corporate session and which customer requests are waiting in a queue. From the hosted **GoToAssist Corporate 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.

This status data can also be retrieved using the **GoToAssist Corporate Monitors API**. Integrating the status of agents using GoToAssist Corporate 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 Corporate 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 Corporate 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 Corporate 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 Corporate monitor data with “smart queuing” or ACD systems enhances customer support. The **GoToAssist Corporate Monitors API** helps achieve a more complete integration with defined routing systems.

Integration Case Study

A leading medical device manufacturer in North America uses GoToAssist Corporate to support doctors using their products in hospitals and clinics around the country. GoToAssist Corporate integration streamlines the support process for all the participants. These systems capture images and video



Available Agent



**Agent in
GoToAssist Session**



Agent on Phone

For more information: Contact Citrix Online to request the GoToAssist Corporate Monitors Web Services API Developer's Guide.

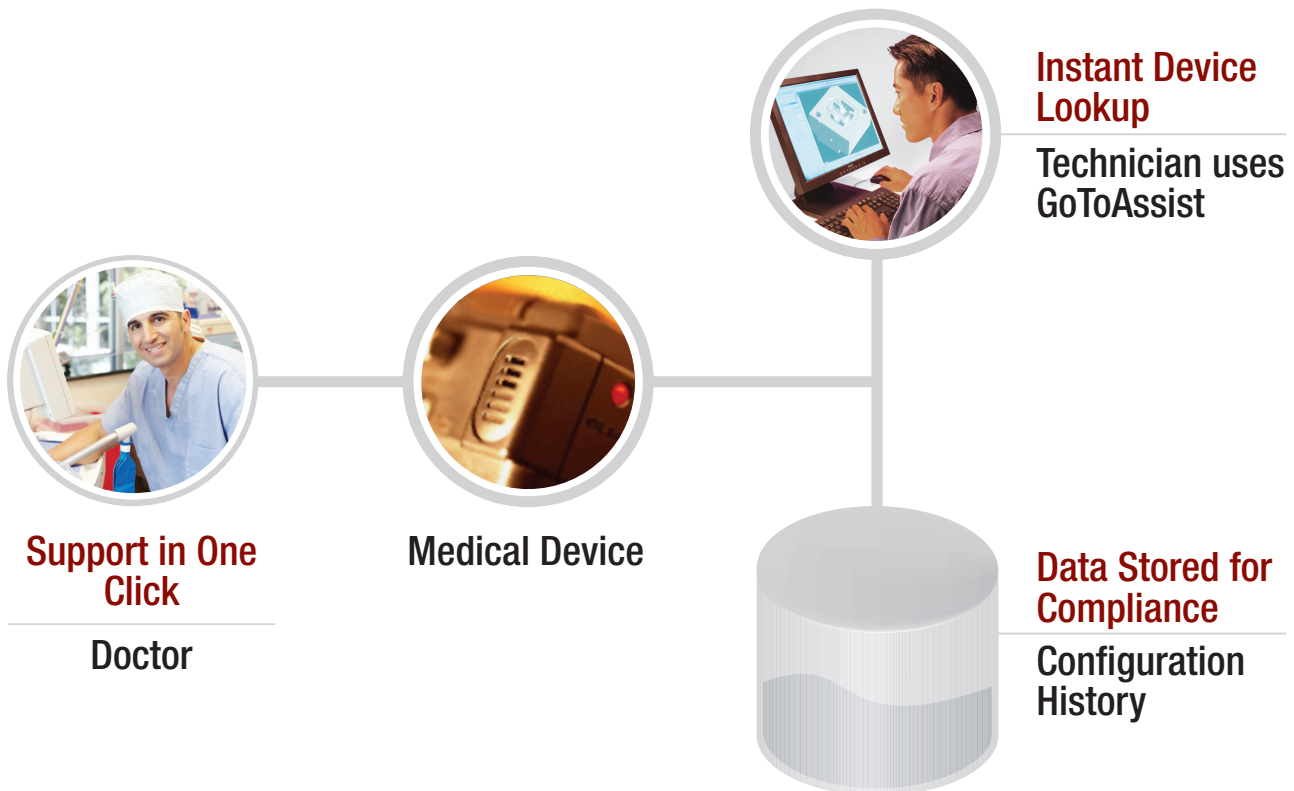
Data Integration of Remote Support Session is routed to next available agent.
Monitor Agents: Who is in session? Who is available? Integrate with ACD or "Smart Queuing" systems.

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 Corporate.
- **Agent-Side Integration:** The technician receives the request with the serial number captured via GoToAssist Corporate. 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 compliance with government regulations. All GoToAssist Corporate 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 Corporate integration provides these benefits:

- **Instantaneous Resolution:** The simple click of a button brings a support agent online immediately to configure the device.



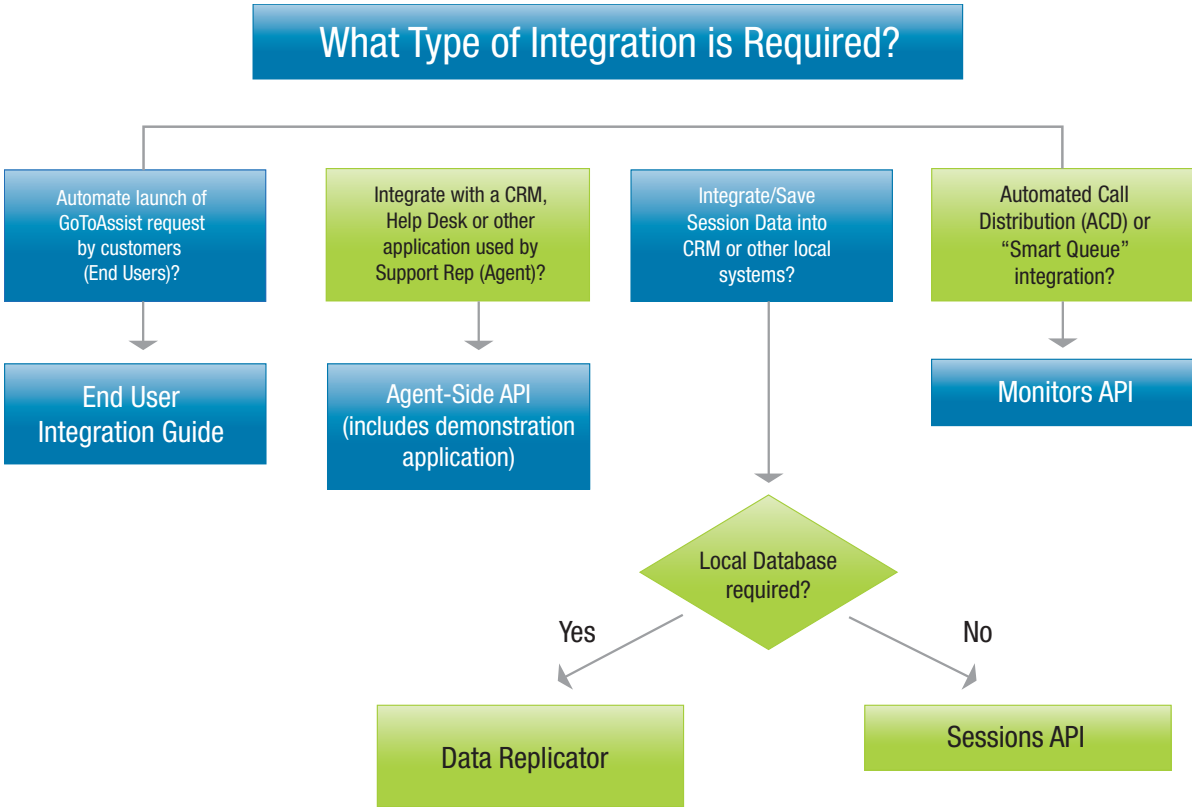
- **Saves Shipping Costs:** Manufacturer saves money by avoiding shipping costs.
- **Saves Doctor’s Time:** Doctors find it easy to get support, which saves time and eliminates frustration.
- **Improves Patient’s Health:** Patients are not required to come back for multiple visits when a device is not ready, thus improving the speed of diagnostics.

Conclusion

Citrix GoToAssist Corporate 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 Corporate integration can enhance business operations in the following ways:

- Provides customers 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



Appendix: Security Standards Compliance

GoToMeeting is compliant with the following industry and U.S. government standards for cryptographic algorithms and security protocols:

- The TLS/SSL Protocol, Version 1.0 IETF RFC 2246
- Advanced Encryption Standard (AES), FIPS 197
- (FIPS Validated Implementation, NIST Certificate #175)
- AES Ciphersuites for TLS, IETF RFC 3268
- RSA, PKCS #1
- SHA-1, FIPS 180-1
- (FIPS Validated Implementation, NIST Certificate #89)
- HMAC-SHA-1, IETF RFC 2104
- MD5, IETF RFC 1321
- Pseudorandom Number Generation, ANSI X9.62 and FIPS 140-2

Appendix: Cybertrust Certification

Cybertrust Corporation provides companies with comprehensive enterprise risk-management programs that assure the ongoing security of their critical systems and information. SiteSecure from Cybertrust is a security assurance and certification program that addresses all aspects of information security — from network and system analysis to physical and policy evaluation. The rigorous three-month certification process is validated regularly with quarterly audits.



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About Citrix Online

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