



GoToAssist® Express
User Guide

Version 1.0

Citrix Online

6500 Hollister Avenue • Goleta, CA 93117
+1-805-690-6400 • Fax: +1-805-690-6471
© 2009 Citrix Online, LLC. All rights reserved.

Contents

Getting Started	3
System Requirements	3
Install GoToAssist Express.....	4
Preferences	4
<i>General Preferences</i>	4
<i>Connection Preferences</i>	5
<i>Screen Sharing Preferences</i>	5
Terms	6
GoToAssist Express Components.....	7
Log In and Connect	8
Start GoToAssist Express.....	8
Close or Exit GoToAssist Express.....	8
Start a Support Session.....	9
<i>Step 1: Generate a Support Key</i>	9
<i>Step 2: Share the Support Key with your customer</i>	10
End a Support Session	10
Screen Sharing.....	11
Share My Screen.....	11
Resize the Image of Your Customer’s Desktop.....	12
Navigate the Desktop Image with Auto-Scroll.....	12
Resize the Viewer Window.....	12
Multiple Monitor Support	13
Monitor Layout Window	14
Features	15
File Transfer	15
Cut/Copy/Paste	16
Request Diagnostic Report	17
Chat.....	18
Notes.....	18
Drawing Tools	19
Run as a Service.....	19
Send the Ctrl-Alt-Delete Command.....	20
Reboot/Reconnect	20
Unattended Support	21
Unattended Support Setup.....	21
Connect to an Unattended Computer	22
Remove or Block Unattended Support	23
Change Your Unattended Support Access Code	23
Generate Reports	24
Attended Session Usage Report	24
Unattended Session Usage Report.....	24
Contact Support	25

Getting Started

Thank you for using Citrix® GoToAssist® Express 1.0. This user guide will introduce you to the newest of the Citrix products.

Citrix GoToAssist Express is a Web-based technology that enables you to deliver live technical support anywhere in real time. With this technology, you can:

- Communicate with a customer via a chat box
- View your customer's desktop
- Share control of your customer's mouse and keyboard
- Send and receive files
- Reboot and reconnect to your customer's computer
- Use the Remote Diagnostics tool to retrieve key information on the status of the customer's computer
- Connect with up to eight customers at one time
- Provide unattended support
- Leave zero footprint on your customer's computer

System Requirements

Your System

- Required: Windows® Server 2003, Windows® XP or Windows® Vista; or Mac® OS X 10.4 or later
- Required: Internet Explorer®, Netscape® Navigator 4.0 or later, Mozilla® Firefox® 1.0 or later or Safari™ 1.3 or later
- Required: Ability to make direct outgoing TCP connections or availability of an HTTP proxy or a SOCKS server
- Recommended: Minimum of Pentium 300 with 64MB of RAM
- Recommended: Stable Internet connection with 56k or better

Your Customer's System

- Required: Windows Server 2003, Windows XP, Windows Vista or Mac OS X 10.4 or later
- Required: Internet Explorer, Netscape Navigator 4.0 or later, Mozilla Firefox 1.0 or later or Safari 1.3 or later
- Required: 28.8Kbps or greater connection, 56K recommended
- Required: Ability to make direct outgoing TCP connections or availability of an HTTP proxy or a SOCKS server

Mac Support



GoToAssist Express users can provide live support to both PC and Mac users – from either a PC or a Mac computer. However, some features are not currently available for use on the Mac platform.

Install GoToAssist Express

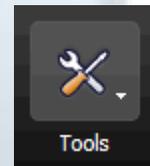
► To download and install GoToAssist Express

1. Go to www.gotoassistexpress.com.
2. Log in with your account email and password.
3. Click the **Download & Start** button to download and launch the application.
4. Click **Yes** or **Always** if prompted by your browser.

Note: You can download GoToAssist Express to as many of your computers as you like but you can only support from one PC or Mac at a time.

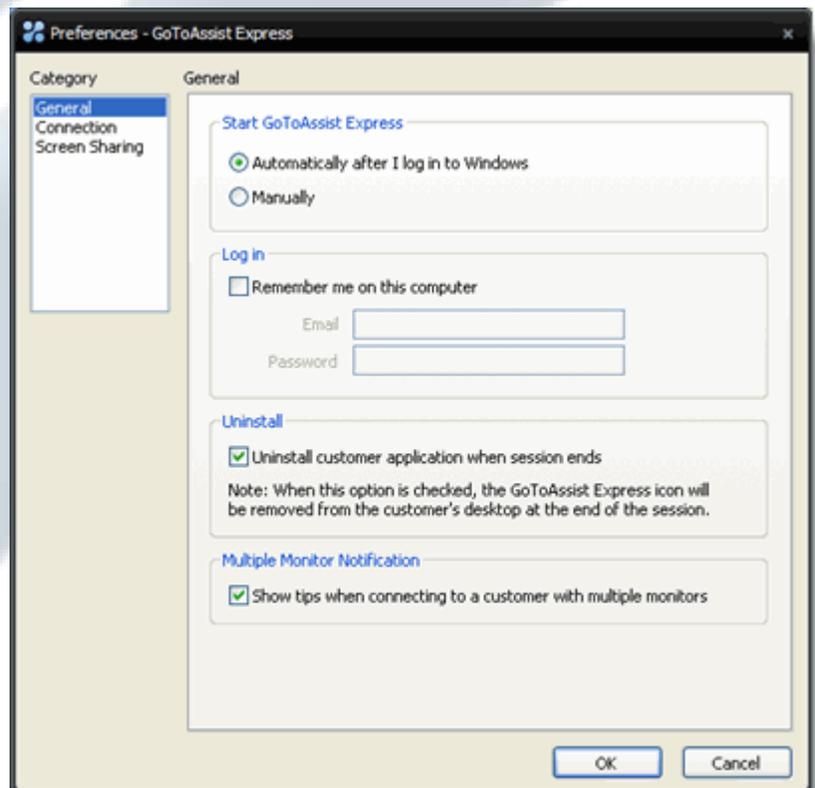
Preferences

The Preferences feature allows you to set your preferences for how you want GoToAssist Express to perform for you. Your preferences can be accessed once you've logged in by either right-clicking the  icon in the system tray, or from the **Tools** button in the Viewer.



General Preferences

- *Automatically after I log in to Windows* – This option starts GoToAssist Express automatically after you log in to your PC.
- *Manually* – This option sets GoToAssist Express to start only when you launch the application from your Programs Menu.
- *Remember me on this computer* – This checkbox enables automatic log in to GoToAssist Express.
- *Uninstall customer application when session ends* – When this option is checked, the GoToAssist icon and application will be removed from the customer's desktop at the end of the session. Leaving the application on the customer's computer will help the next session start faster.
- *Multiple Monitor Notification* – This option provides tips to you while you're supporting customers with multiple monitors.



Connection Preferences

The *Connection* category allows you to test the status of your GoToAssist Express connection.

Note: To ensure a valid connection test, we advise that you refrain from testing your connection unless a GoToAssist Express Customer Care representative directs you to perform the connection test.

Screen Sharing Preferences

Color Quality – Select True Color for better appearance or 256 Colors for improved speed.

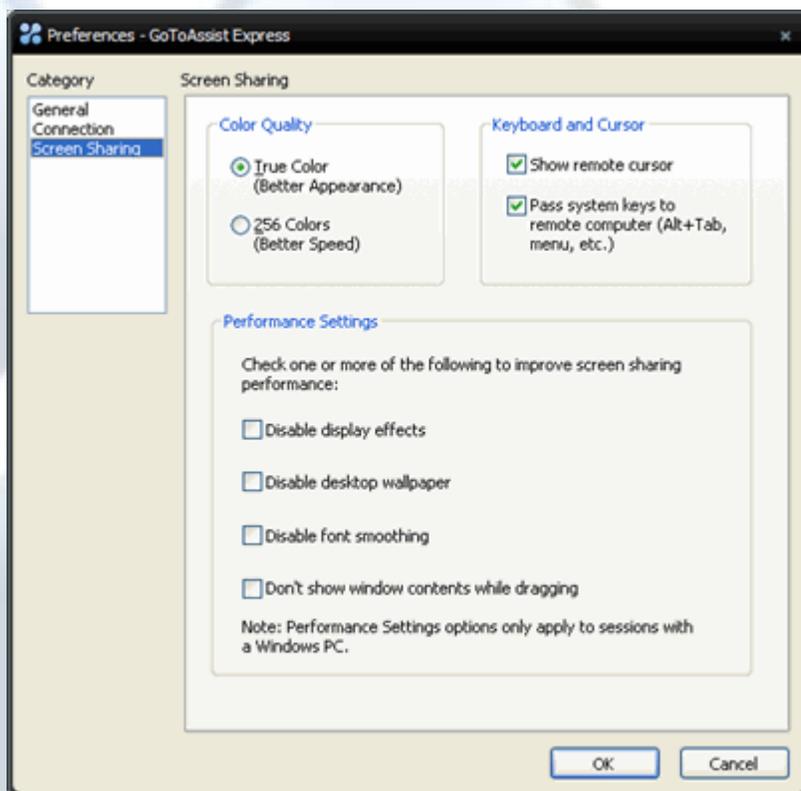
Show remote cursor – View the cursor on your customer's computer as well as your own.

Pass system keys – Allows some Windows key functionality to be passed to the customer's PC, such as Alt+Tab.

Performance Settings – Disable any or all of the following display options to improve speed.

- Display effects
- Desktop wallpaper
- Font smoothing
- Windows contents while dragging

Note: Performance Settings options only apply to sessions with a Windows PC.



Terms

- **Portal** – This will be the Web page that you will direct your customer to, in order to connect with the session. The portal that your customer will go to is www.fastsupport.com
- **Support Key** – This is the 9-digit code that you will provide to your customer, which needs to be inserted on the portal page in order to start a session with the customer.
- **Viewer** – The Viewer is the window used to view your customer's desktop while in a session. The Viewer window has its own menu bar and can support up to 8 simultaneous sessions.
- **Customer's Toolbar** – The customer's toolbar offers your customer the ability to end a session, stop screen sharing, initiate chat and send files.
- **Unattended Support** – This feature is available for those cases when a customer wants to allow you to access their PC when they are away from their computer.

GoToAssist Express Components

The primary components of a GoToAssist Express session.

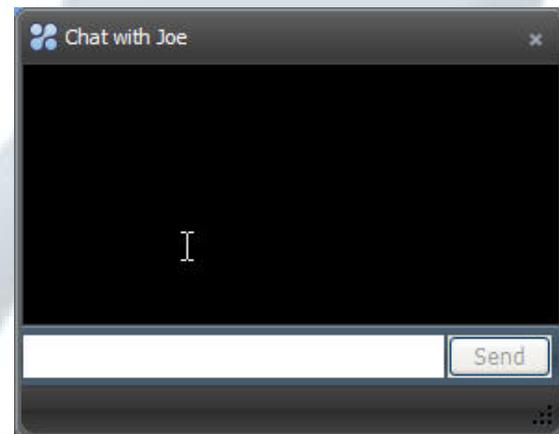
Viewer Window

The Viewer window provides the screen-sharing connection and tools needed to support your customers.



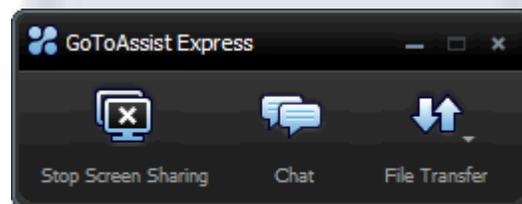
The Chat Box

The chat box allows you and your customer to communicate without a phone connection.



The Customer Toolbar

The customer toolbar provides your customer with a level of control during the session.



Log In and Connect

Start GoToAssist Express

► To start GoToAssist Express

1. If you've already installed GoToAssist Express, then locate and double-click the GoToAssist Express icon  in your system tray or Mac dock. You can also right-click the  icon in the system tray and select *Start Support Session*.

If the  icon is not in your system tray, navigate to the *Citrix* program folder from the Windows **Start** button and select *GoToAssist Express*.

2. Enter your email and password in the *Login* window and click **Log In**.

Note: After 5 failed login attempts a soft lockout of 10 minutes will result.



Returning users please log in here:

Email

Password

Remember me on this computer

[Forgot your password?](#)

Don't have a GoToAssist Express account?
[Register now!](#)

► To start GoToAssist Express from the Web site

1. Log in to www.gotoassistexpress.com with your email and password.
2. Select the *Start Support Session* link from the left navigation menu. GoToAssist Express will automatically download to your PC or Mac and begin a session.

Close or Exit GoToAssist Express

To close GoToAssist Express simply click the **X** in the top right corner of the Viewer window.

To fully exit from GoToAssist Express, right-click the  icon in your system tray and select **Exit**. Keep in mind that starting a new session is quicker if GoToAssist Express is running in the background.

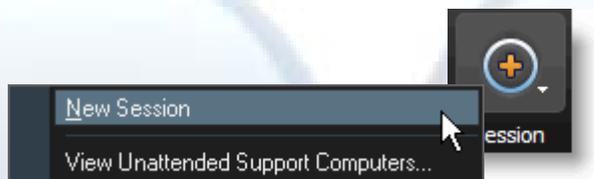
Start a Support Session

To begin a support session, you must first generate a Support Key and then convey that key to your customer.

Step 1: Generate a Support Key

You will need to generate a different Support Key for each session and each customer. Once a Support Key has been created it is valid for 10 minutes.

- Click the **Session** menu at the top of the Viewer and then select *New Session*.



-or-

- Double-click the  icon in your system tray or Mac dock to begin a new session.

-or-

- Right-click the  icon in your system tray and select *Start Support Session*.



Step 2: Share the Support Key with your customer

- Direct your customer to www.fastsupport.com and have him or her type their name and Support Key into the connection box.

-or-

- Click the **Email Support Info** button in the middle of your screen. This will open an email in Microsoft® Outlook® with the Support Key and URL. Send the email to the customer and have the customer click the link that is included in the email.

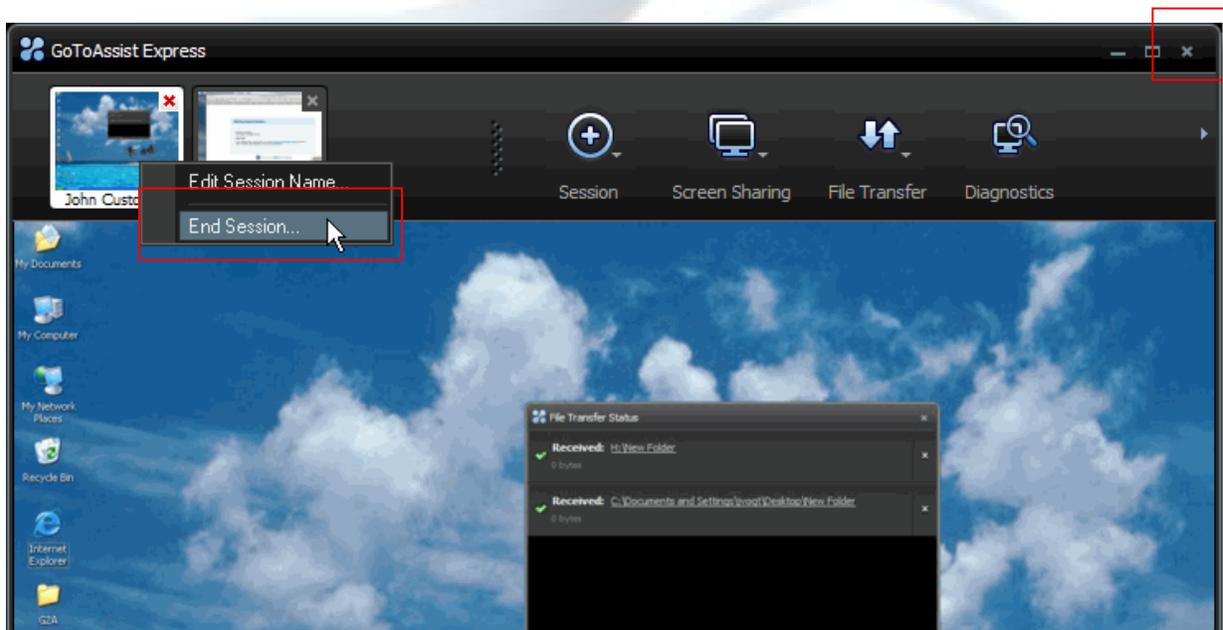
-or-

- Click the **Copy Support URL** button. Paste the information into an email or instant-messaging application and have your customer click the support link.



End a Support Session

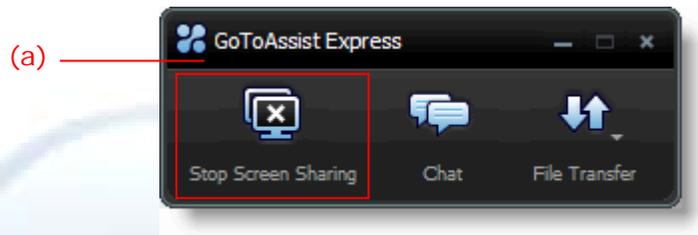
You or your customer can end the support session at anytime. To end a session with your customer, simply right-click the session thumbnail at the top left of the Viewer and select *End Session*. Clicking **X** at the top right of the Viewer will end all of your current sessions.



Your customer can exit the session by clicking the **X** at the top right of their toolbar.

Screen Sharing

The Screen Sharing component of GoToAssist Express allows you to view and access your customer's desktop. Your customer must first confirm that they are willing to share their screen at the beginning of the session and can stop the screen sharing portion of the session at any time from their toolbar (a).

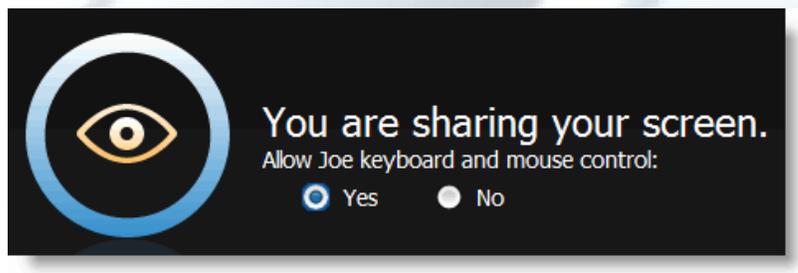
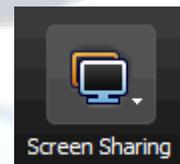


Share My Screen

When you begin a new support session you automatically start by viewing your customer's desktop but that can be reversed so that you can share your desktop with your customer.

► To share your screen with your customer

1. From the Viewer select the **Screen Sharing** menu.
2. Select *Share My Screen*.
3. Decide whether or not you want to share your keyboard and mouse with your customer and then minimize the Viewer to display your desktop.



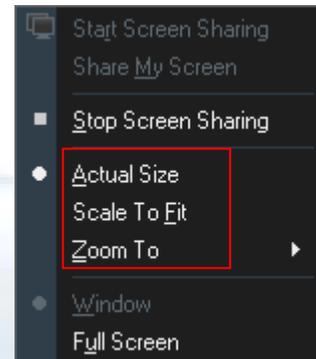
► To return to viewing your customer's screen

1. From the Viewer select the **Screen Sharing** menu.
2. Select *Start seeing <customer's name> Screen*.

Resize the Image of Your Customer's Desktop

You can choose to change the size of the image of your customer's desktop within your Viewer. You have the options of choosing to adjust your image size to Actual Size, Scale to Fit or Zoom To.

- **Actual Size** - Displays the actual image of customer's desktop within the Viewer and may require you to auto-scroll.
- **Scale to Fit** - Displays the image of the customer's desktop scaled to fit the whole desktop image within the Viewer. It will display just one monitor if the customer has multiple monitors.
- **Zoom To** - Allows you to zoom the image to a setting you choose. You can choose from several pre-set options or choose a custom option. This selection may require you to scroll.



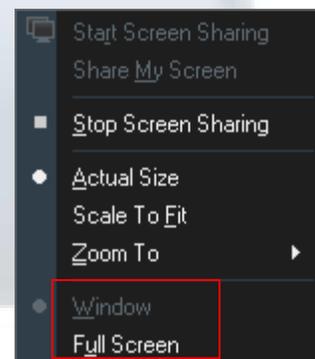
Navigate the Desktop Image with Auto-Scroll

If the customer's desktop image is larger than your Viewer window, then a portion of the screen will be hidden. To navigate the customer's desktop, move the mouse to the edge of the Viewer window in the desired direction and the customer's entire desktop image will auto-scroll within the Viewer.

Resize the Viewer Window

You can choose to have the Viewer appear as a window on your desktop or as a full-screen image.

- **Window mode** - The Viewer appears as a window on your desktop just like any other application. The Viewer buttons on the top of your screen are always available and you can resize the Viewer just like any other application window.
- **Full Screen mode** - The Viewer expands to full screen and the Viewer menu auto-hides at the top of the screen. A tab is displayed at the top of the screen; this tab enables access to the Viewer buttons and menus when needed.



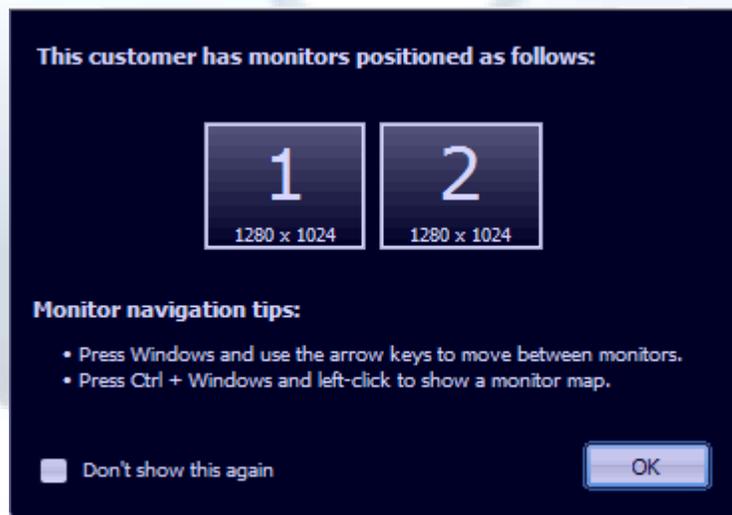
Multiple Monitor Support

GoToAssist Express helps you support those of your customers with multiple monitors. You can navigate between the monitors a few different ways while in a session. The following screen is displayed when GoToAssist Express identifies a system with multiple monitors.

Note: If you and your customer both have two monitors then you can view both of their monitors at the same time by holding the <Shift> key on your keyboard and then clicking the expand button on the top right of your Viewer.



Multiple monitor support is currently unavailable for Mac users.



▶ Working with a multi-monitor customer

- To select another monitor, click the arrow button located on either side of the Viewer.



–or–

- You can also click the <Windows> key + the left or right arrow key on the keyboard to quickly switch between monitors.

–or–

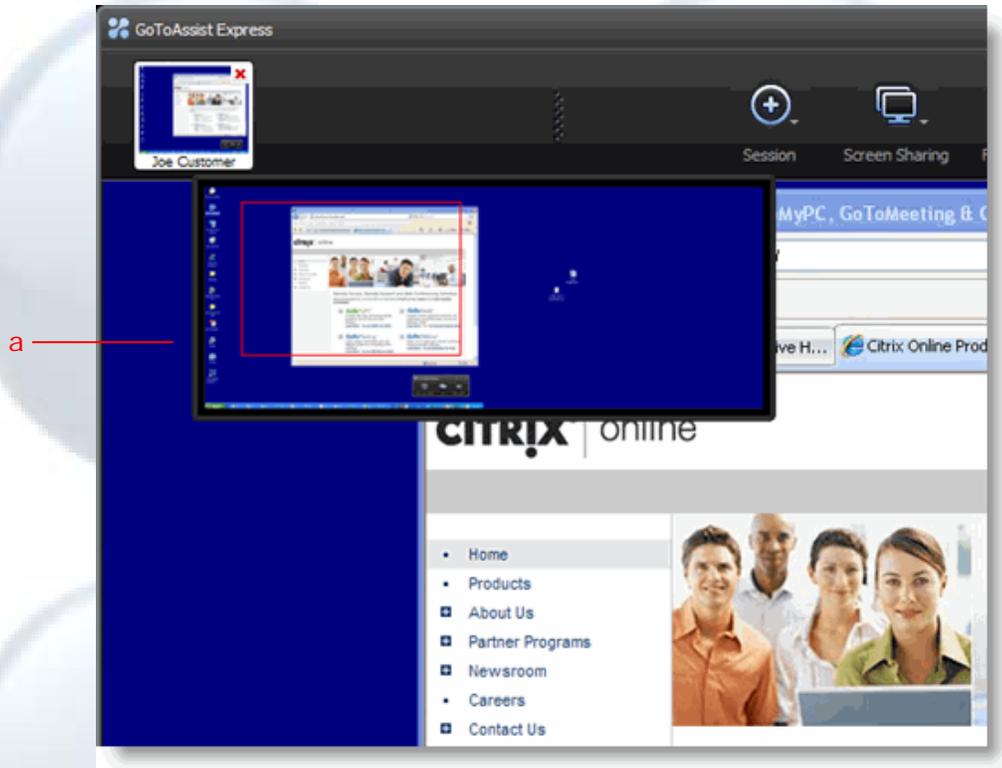
- The *Monitor Layout window* is also very useful for navigating multiple monitors.

Monitor Layout Window

The Monitor Layout window is a scaled down version of your customer's monitor(s) and is useful when you need to quickly navigate to a different area of your customer's desktop.

► Navigate with the Monitor Layout window

1. From the Viewer, press and hold down the <Ctrl><Windows> keys on your keyboard and then click the left mouse button to display the Monitor Layout window (a).
2. While holding down the mouse button, maneuver the red box around to display the desired desktop location.



Features

File Transfer

The File Transfer feature enables you and your customer to exchange files and folders. It uses the same firewall and proxy-friendly connection techniques as Screen Sharing. There are no restrictions on the type or size of files that can be sent.

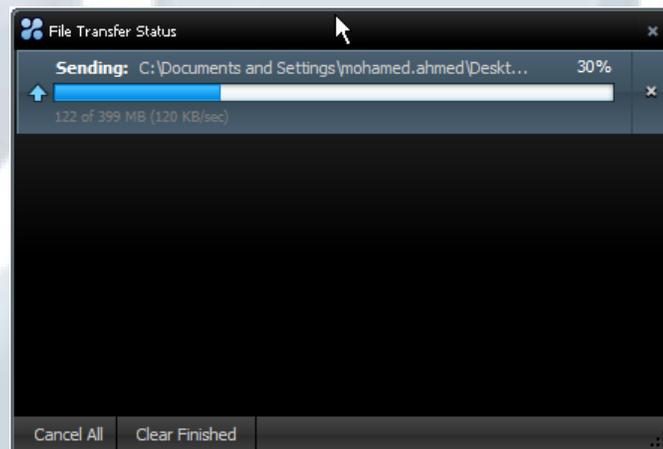
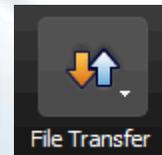


The File Transfer feature is currently unavailable for Mac users.

▶ To send a file to your customer

1. From the Viewer select the **File Transfer** menu and select *Send Files*.
2. Locate the file or folder to be transferred and select **Send**.
3. To send the file, you or the customer must choose a location for the file and click **Save**.

You and your customer both receive confirmation through a *File Transfer Status* window.



▶ To drag and drop files

- To drag and drop a file or folder directly between your computer and your client's, simply drag a file from your desktop onto the Viewer to start copying.

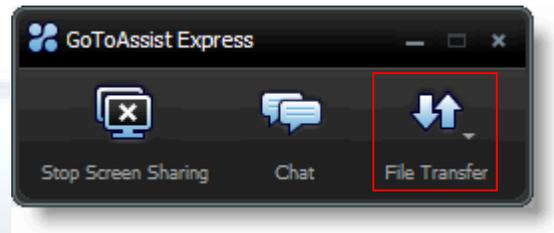


▶ To receive a file from your customer

1. From your Viewer select **File Transfer** and select *Get Files from Customer*.
2. You or your customer can locate the file and select **Send**.
3. Select a location for the file and then click **Save**.

► **If your customer wants to send you a file**

1. Your customer can select the **File Transfer** button from their toolbar and select *Send files*.
2. Your customer navigates to the file they wish to transfer and selects **Send**.
3. You are prompted to choose a location to store the file and then click **Save**.



Cut/Copy/Paste

The Cut/Copy/Paste feature enables you to cut, copy and paste text between your computer and your client's computer during a session.

Note: The Cut/Copy/Paste feature has a text-only maximum of 1.5 MB of data.

► **To cut/copy and paste text**

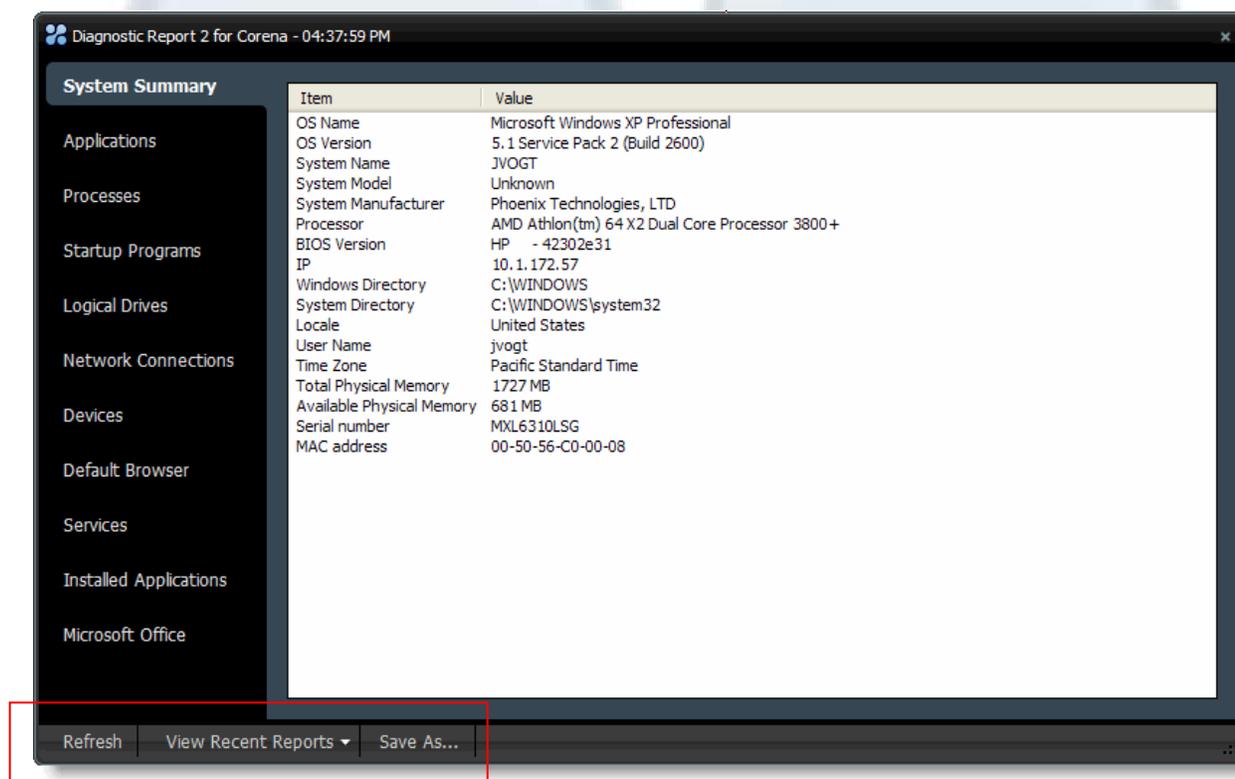
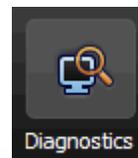
1. Select the text you want to cut or copy by left-clicking your mouse and dragging the cursor over the text.
2. Right-click your mouse on the selected text and choose *Cut* or *Copy*.
3. Place your mouse in the location where you want to paste the text and left-click your mouse.
4. Right-click your mouse and select *Paste*.

Request Diagnostic Report

The Diagnostic Report feature enables you to access specific system information on the customer's PC or Mac.

► To run system diagnostic report

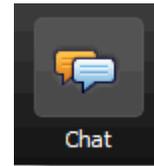
1. To view the diagnostics report, select the **Diagnostics** button from the Viewer.
 - To save the report, click the **Save As** button at the bottom of the *Diagnostic Report* window and select either a text or XML file.
 - To run the report again, select the **Refresh** button at the bottom of the *Diagnostic Report* window.
 - Compare or view earlier reports by clicking the **View Recent Reports** button.



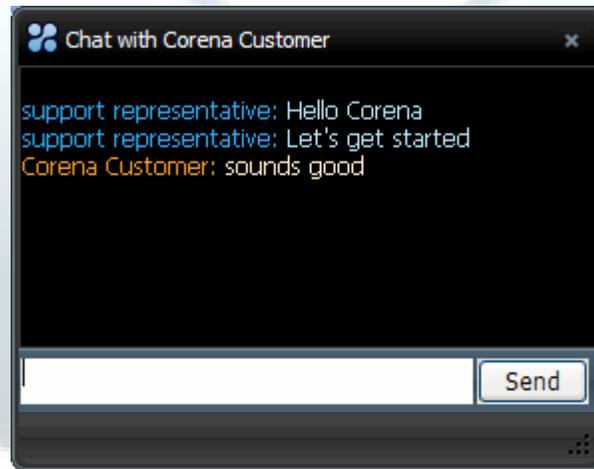
Chat

Chat is a function that enables you to communicate with your customer during a support session.

To communicate via Chat, select the **Chat** button from the Viewer, enter your text into the text entry field and click **Send** or press the <Enter> key on your keyboard. The chat text is viewable during the session even if the chat window is closed and then later opened during the session. Your PC customers can also initiate the chat feature from their toolbar.



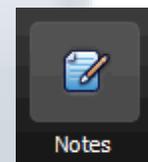
The Chat feature is currently unavailable for Mac users.



Notes

The Note function allows you to capture thoughts regarding the session that you may want to reference later.

To access the notes, select the **Notes** button from the Viewer, enter your text and then click **Save** at the bottom of the window. You can access these notes later from either the [Attended Session Usage Report](#) or the [Unattended Session Usage Report](#).



Drawing Tools

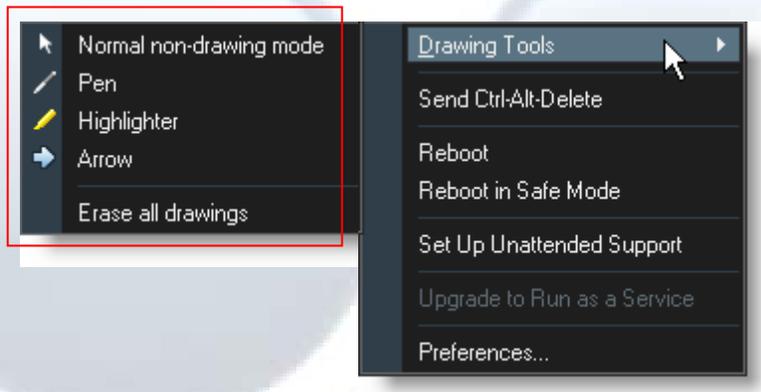
The Drawing Tools feature can be useful during collaborations or demonstrations.

To access the Drawing Tools, select *Drawing Tools* from the **Tools** menu on the Viewer. Once a drawing tool is enabled, the *Drawing Tools* menu can be reselected by either clicking on the drawing tools option or by right-clicking on your mouse. To deactivate a tool simply select *Normal non-drawing mode* from the menu.

Note: Press the <Shift> key on your keyboard to make a straight line with the pen or highlighter.



Drawing Tools are currently unavailable for Mac users.



Run as a Service

Running as a service allows GoToAssist Express to run beyond the basic application level for improved support. Running as a service allows you to send Ctrl-Alt-Delete commands, switch usernames and avoid limitations imposed by the Microsoft Windows Vista User Account Control (UAC). GoToAssist Express runs as a service by default and does not violate or circumvent the security model on your customer's computer.

If your customer has limited login credentials, GoToAssist Express will run as an application rather than a service. If you or the customer later enters admin level credentials then you can select *Upgrade to Run as a Service* from the **Tools** menu.



The Run as a Service feature does not apply to customers with a Mac. It also cannot be initiated by a support provider using a Mac.

Send the Ctrl-Alt-Delete Command

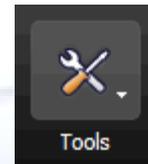
The Send Ctrl-Alt Delete feature is useful if you need to log in with different Windows credentials, lock the customer's computer, access the Task Manager, etc.



The Send Ctrl-Alt Delete feature is currently unavailable for Mac users.

► To send a Ctrl-Alt-Delete to your customer's computer

1. Select the **Tools** menu from the Viewer.
2. Select the *Send Ctrl-Alt-Delete* command.



Reboot/Reconnect

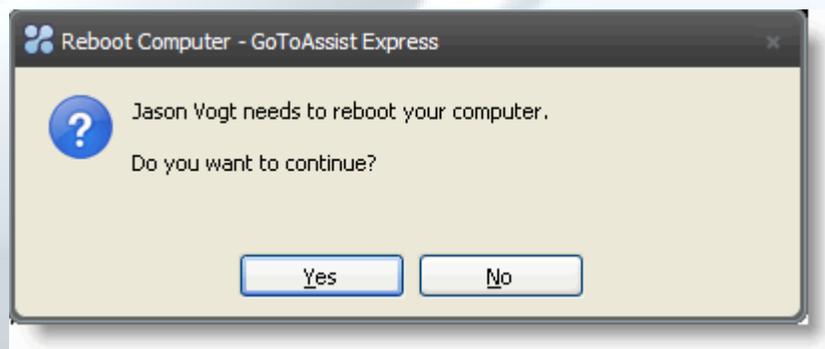
To aid with software installation and upgrades, you can initiate a shut-down, restart and reconnection of the customer's computer. Initiating the reboot and reconnect from your Viewer enables the customer to reconnect to the support session without having to post another query or download the GoToAssist Express software again.



The Reboot/Reconnect feature is currently unavailable for Mac users.

► To reboot a customer's computer and reconnect to the existing session

1. Click the **Tools** menu from the Viewer and select *Reboot* or *Reboot in Safe Mode*.
2. Either you or your customer can click **Yes** to authorize the Reboot/Reconnect. Selecting **No** will cancel the Reboot.



3. The Windows login screen is displayed upon reboot, which provides you the opportunity to log in with your own credentials. Otherwise, once the customer has entered his or her password the session will continue.

Unattended Support

The Unattended Support feature allows you to connect to your customer's PC without the customer being present. With security in mind, Unattended Support can not be set up without permission from your customer.

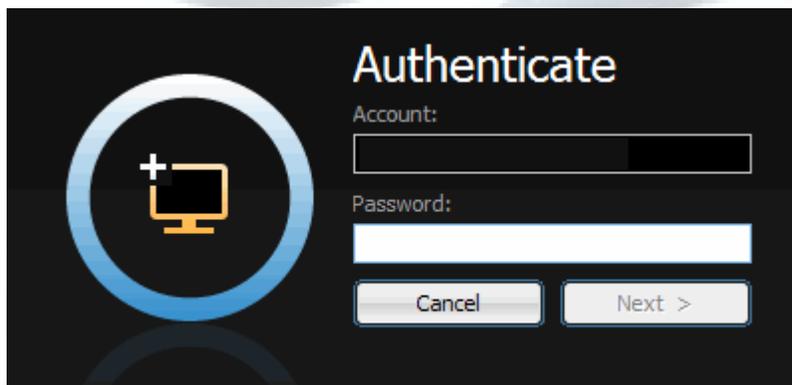
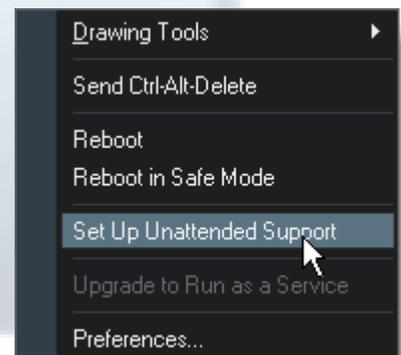


The Unattended Support feature is currently unavailable for Mac users.

Unattended Support Setup

► To set up a customer's computer for Unattended Support

1. Start a session with your customer's computer.
2. Click the **Tools** menu and select *Set Up Unattended Support*.
3. A setup prompt appears on your customer's desktop that only they can approve and requires their Windows password.
4. To authenticate the Unattended Support from your side, enter your GoToAssist Express username and password.



5. Create a *nickname* for your customer's computer to make it easy to distinguish from those of your other customers (e.g., Customer John's Home Computer.)
6. Create and confirm an *access code* for the unattended computer with at least 6 characters that includes both numbers and letters. Keep this access code in a safe place and keep in mind that you will not be able to access your customer's PC without it.
7. A confirmation window appears on your customer's PC when the installation is complete.

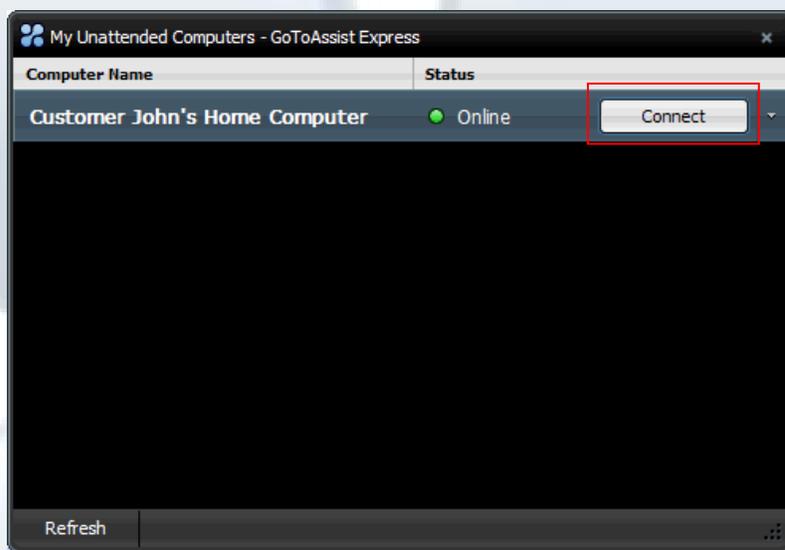
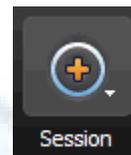
Connect to an Unattended Computer

After a computer has been enabled with Unattended Support you can access your customer's unattended computer at any time. After you have disconnected from the Unattended Support session the customer's computer is automatically locked.

Note: After 15 minutes of inactivity an unattended support session will automatically disconnect.

► To connect to a customer's computer with Unattended Support

1. Click the **Session** menu from the Viewer and select *View Unattended Support Computer*. You can also access this feature by right-clicking the  icon in the system tray.
2. Click the **Connect** button next to the computer you would like to connect to.



3. Enter the access code you created earlier for this unattended computer.
4. At your customer's Windows login screen click the link at the top of the screen to populate the password field with the customer's private Windows password.

Note: Your customer's Windows password is encrypted on your customer's PC during the initial Unattended Support setup. The password remains private and is never transmitted over the Internet.



Remove or Block Unattended Support

You or your customer can remove Unattended Support from his or her PC at anytime from the  icon in their system tray. Your customer can also block/unblock Unattended Support access by simply selecting *Block Access* from the menu.

► To Remove Unattended Support from your Customer's PC

1. Right-click the  icon in the customer's system tray.
2. Select *Remove* from the *Unattended Access* menu.
3. Click **Yes** to confirm.



Change Your Unattended Support Access Code

► To change the Unattended Support access code

1. Start a session with your customer and then right-click the  icon in the customer's system tray.
2. Select *Access Code* from the *Unattended Access* menu.
3. Enter your GoToAssist Express password from the *Authenticate* window and click **OK**.
4. Enter the new access code, confirm and then click **OK**.



Generate Reports

► To generate a session report

1. Log in to your account at www.gotoassistexpress.com.
2. Click the *Reports* link in the left navigation bar.
3. Select the type of report, date range and format and then click the **Generate Report** button. Your report will load in a new window.

Note: Data is available online for one year from the date of occurrence.

Attended Session Usage Report

Field definitions

Attended Sessions Report	
Number of Sessions	Total number of sessions for the selected date range
Total Time	Total amount of time in attended sessions for the selected date range
Average Duration	Average amount of time of all sessions for the selected date range
Session Date	Date of the session
Session ID	Unique identifying number associated with each session
Session Start	Start time for the session
Session Stop	End time for the session
Duration	Number of minutes for the session
Customer Name	The customer's name
Customer IP	IP of the customer's computer used during the session
Rep IP	IP of the representative's computer used to conduct the session
Rep Notes	Notes that were typed in during the session

Unattended Session Usage Report

Field definitions

Attended Sessions Report	
Number of Sessions	Total number of unattended sessions for the selected date range
Total Time	Total amount of time in unattended sessions
Average Duration	Average amount of time of all unattended sessions for the selected date range
Session Date	Date of the unattended session
Session ID	Unique identifying number associated with each session
Session Start	Start time for the session
Session Stop	End time for the session
Duration	Number of minutes for the session
Host Name	Host name of the customer's computer
Host ID	Host ID of the customer's computer
Customer IP	IP of the customer's computer used during the session
Host MAC	MAC address of the customer's computer
Rep IP	IP of the representative's computer used to conduct the session
Rep Notes	Notes that were typed in during the session

Contact Support

If you are experiencing problems with GoToAssist Express or have questions, please contact us online:

- Customer Support: customercare@gotoassistexpress.com
- Billing or account questions: gotobilling@gotoassistexpress.com
- GoToAssist Express blog: <http://blog.gotoassist.com>
- GoToAssist Forums: <https://forums.gotoassist.com>

Or phone us anytime, 24/7:

Country	Toll-Free	Direct Dial
U.S. and Canada	888-621-0542	+1-805-617-7006
United Kingdom	0800-051-8900	001-805-617-7006
Europe	00-800-8880-0011	001-805-617-7006
Australia	0011-800-8880-0011	00111-805-617-7006
Mexico	001-888-840-6248	001-805-617-7006
India	000-800-100-3358	001-805-617-7006
New Zealand	00-800-8880-0011	001-805-617-7006
Finland	990-800-8880-0011	001-805-617-7006
Hong Kong	001-800-8880-0011	001-805-617-7006
Singapore	001-800-8880-0011	001-805-617-7006
Japan	010-800-8880-0011	010-805-617-7006

*Toll-free service unavailable in some areas