Citrix[®] GoToAssist[™] Corporate Representative User Guide



Citrix[®] GoToAssist[®] Corporate Representative

User Guide

Version 9.1

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GoToAssist Corporate Overview

Citrix[®] GoToAssist[™] Corporate is a Web-based technology that enables representatives to deliver live technical support anywhere in real time. With this technology, a representative has the ability to:

- Communicate with the customer via a Chat box
- View the customer's desktop and/or allow the customer to view the representative's desktop
- Use the draw, highlight and arrow stamper tools on the shared desktop
- Share control of the mouse and keyboard
- Push Web pages
- Send and receive files
- Reboot and reconnect to the customer's computer
- Transfer a session to an escalation desk
- Invite a co-worker to assist you in or learn from a session
- Use Diagnostic Tools to retrieve key information on the status of the customer's computer
- Connect with up to eight customers at one time

Note: Access to some GoToAssist Corporate features is dependent upon the GoToAssist Corporate configuration. Please see your organization's GoToAssist Corporate administrator to inquire about your specific GoToAssist Corporate configuration.

System Requirements

Your System

- Required: Windows® 2000, Windows® XP, Windows® Vista, Windows 7
- 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
- Recommended: 17-inch monitor or larger
- Recommended: Monitor resolution set to highest possible setting, 1024 X 768 or greater

Your Customer's System

- Required: Windows® 2000, XP, Vista, or Windows 7, Windows Server 2003, Windows Server 2008 or Mac® OS X 10.4 or later
- Required: Internet Explorer, Netscape Navigator 4.0 or later or 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 Corporate users can provide live support to both PC and Mac users - from a PC; however, some features are not currently available for use on the Mac platform. The following features are currently available when connecting to a customer using a Mac.

- Invite Session
- **Representative Chat**
- **Customer Chat**
- Pause Screen Sharing
- Stop Screen Sharing

GoToAssist Components

There are several components of the GoToAssist technology.

HelpAlert[™]

HelpAlert resides on your computer and enables you to receive and reply to incoming customer queries.

HelpAlert Desktop I con HelpAlert is a no-install executable that the representative launches to log in to HelpAlert. 🙆 GoToAssist - Log In GoToAssist Corporate v9.0 Build 568 login. Login Password: Role: Representative v Forgot your password? Log In Cancel **HelpAlert List View** The List View shows the representative 🔳 - 🐹 🗒 Avalable incoming customer queries and enables representative response. In Se HelpAlert System-Tray Icon

HelpAlert Log-In Window

The log-in window appears after launching the HelpAlert executable and enables representative

X



HelpAlert can be configured to run in the system tray.

Citrix[®] GoToAssist[™] Corporate Representative User Guide Representative Chat Box (ChatLink[™])

The Representative Chat box allows for nearly instantaneous chat with the customer. It also provides access to support tools such as Web Page Push, Pre-Scripted Responses, File Transfer, Reboot/Reconnect, Start and Stop ScreenSharing, Remote Diagnostics and Change Access Levels (in Share My Screen) and can be configured to minimize to the representative's desktop upon connection.

P 208		1
loe	Please help ne with my technical issue.	
GOTOAssist	(15:43)	Cetals
Session ID: Representati Itandard Tin Portal: 02A anguage: 6 Oustomer: 3 Suestion: Pic Oustomer Ti Oustomer Ti	re's Start Time: 15:40:57 (GHT -8.02) Paofio oglish as help me with my technical issue. ne Zone: (GHT -8.02) Paofic Standard Time 2005 SP2 -4: Mo	Session ID: 181502866 Pontid G29 Repeating Cright Repeating Cright Standard Time Database Standard Time Cristianes Time Zone: (Mill - 00) Produced Time OS: NI P 5 1 2005 92 Attractions Time Standard Time Standard Standard Time OS: NI P 5 1 2005 92 Attractions
Chat Notes		Jorda Screen
fo at		

Customer Chat Box

The Customer Chat box allows for almost instantaneous chat between the customer and representative. It also enables access to features such as Save Chat Log, File Transfer, Change Access Levels (in Share Customer's Screen), and Annotation Tools.



Viewer Window

The Viewer window is the window that loads on the representative's desktop during a screen-sharing connection and enables the representative to view the customer's desktop and share control of the mouse and keyboard (if configured to do so).

The Viewer window can be configured for *Customer ScreenSharing*, displaying the customer's desktop to the representative, or *Representative ScreenSharing*, displaying the representative's desktop to the customer.

The Viewer window enables shortcuts to the Annotation Tools, Chat Box, Transfer session, Invite to Session, Reboot/Reconnect, File Transfer and Remote Diagnostics.



HelpAlert Alerts

An Alert notifies the representative of a new customer query for Standard and Queue Mode configurations. The Alert displays as a small pop-up window on the representative's desktop and contains the customer's query. By default, the Query Alert stays on the representative's screen for 30 seconds. (This time can be changed in the List View preferences Alert tab.)

Note: Phone Mode implementations do not receive Alerts.

Alerts are color-coded to show the type of query distribution.

Yellow Alerts: Queries posted through a SmartButton[™] or SmartBox[™] portal using Standard Mode. These are visible to all representatives who are logged in to HelpAlert at the time the query is posted.

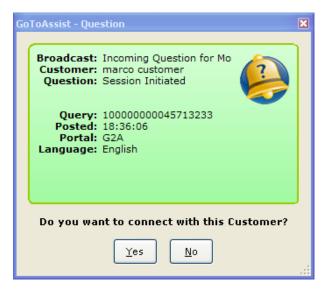
The representative is connected with the customer if he/she is the first available representative who responds to the customer's query.

If a representative replies to another query while in a session, the second query is either queued for that specific representative, or if the representative is configured to handle multiple sessions, the customer is joined with the representative.

If the query is posted through a SmartBox using Queue Mode, it is distributed only to the next available representative.

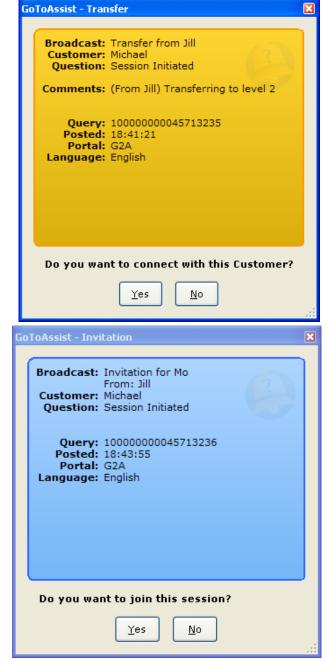
Green Alerts: Queries posted through a SmartMatch[™] portal and only displayed to the selected representative.





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Orange Alerts: Queries posted through a portal designated for escalation purposes and distributed to all representatives who are enabled to receive escalation queries and who are logged in to HelpAlert at the time the query is posted.



Blue Alerts: Queries posted through a portal designated for inviting another representative. The query will post to the selected representative who is enabled to receive invitation queries and who is logged in to HelpAlert at the time the query is posted.

GoToAssist Modes

GoToAssist can be configured several different ways to best suit an organization's support needs. Modes refer to how support sessions are initiated and routed to representatives. There are three types of GoToAssist modes: Standard, Phone and Queue.

Note: The mode type of GoToAssist implementations will vary depending on your organization's support needs. Please see your organization's GoToAssist administrator to inquire about your specific GoToAssist mode.

Standard Web Mode S

Standard Mode is the most common GoToAssist configuration. Standard Mode can be initiated by a customer via the portal page anytime a representative is logged in to HelpAlert. Standard mode uses a SmartButton, SmartBox or SmartMatch portal type. SmartButton and SmartBox portals distribute customer-support requests to all representatives who are logged in to HelpAlert. SmartMatch portals distribute the customer-support request to a specific representative.

Standard Mode highlights:

- Can be configured with various portal types
- Alert distribution varies depending on portal type
- Can be used by customers without also being supported on the phone (can be Web-only support)

SmartCode / Phone Mode 💹

Phone Mode configuration is most often utilized when the representative is also supporting the customer by phone. A customer can initiate Phone Mode only after he/she has received the connection code from the representative. The request is connected only to the specific representative who generated the connection code. Phone Mode uses the SmartCode portal type only.

Phone Mode highlights:

- Only utilized with SmartCode portal type
- Representatives do not receive Alerts
- Customer must first receive a connection code from the representative before connection process can begin
- Only the representative who generated the connection code is connected with the customer
- Almost exclusively used in situations where customers are also receiving phone support by a representative



Queue Mode is implemented in organizations that have a large number of representatives available for customer-support queries. Queue Mode uses only the SmartBox portal type. Queue Mode distributes customer queries to the next available representative and queues additional customer requests for distribution when representatives become available.

Queue Mode highlights:

- Only utilized with SmartBox portal type
- All incoming queries are queued and distributed to the first available representative

Customer Portals

This is the Internet portal where the customer enters a request for a support or demonstration session. The portal type can vary depending on the GoToAssist mode (more about modes on following pages) utilized by your organization. There are four types of portals:

Г

SmartButton Portal	
This portal type is used with GoToAssist Standard Mode and broadcasts an Alert to all available representatives logged in to HelpAlert.	Start Support Session
SmartBox Portal	Company Logo Here
This portal type is used with GoToAssist Standard or Queue Mode and enables a customer to type in a question, which is then either broadcast to all representatives (Standard Mode) or only to the next available representative (Queue Mode).	Use regressentatives are online and standing by: Type year question in the less takes and site "Contense" to present.
	Company Logo Here
SmartMatch Portal This portal type is used with GoToAssist Standard Mode and enables customers to select a specific support representative.	Use regresentatives are online and standing by: rises exist your species takes two the introde and dok "functions" to provide the second state of the second state of the second state the second state of the second state of the second state the second state of the second state of the second state the second state of the second state of the second state the second state of the s
SmartCode Portal	Company Logo Here
This portal type is used exclusively with Phone Mode and connects the customer and the representative with a unique connection code. The code is generated by the representative in HelpAlert and given to the customer. There are no Alerts with this portal type.	Live representatives are online and standing by! Type the odd yes received here your representative and deb "testimes" is present.

Note: Most GoToAssist implementations only use one portal type. Please see your organization's GoToAssist administrator to inquire about your specific GoToAssist configuration.

HelpAlert

HelpAlert is the component of GoToAssist that enables the representative to receive and reply to incoming customer queries.

► To log in to HelpAlert

- 1. The representative locates and doubleclicks the HelpAlert icon.
- 2. Select the Language (Locale) for the portal.
 - Select a language.
 - Click OK.



- 3. In the Log-In window:
 - The representative enters the login in the Login field (always in the form of an email address).
 - The representative enters the password in the Password field.
 - The representative clicks Log In.
- 4. To change the language:
 - After logging in, the representative may change the language selection.
 - Within HelpAlert, choose the Options Menu.
 - Select Change Language.
 - HelpAlert will need to be restarted.





To log out of HelpAlert

1. In the upper-right corner of the HelpAlert List View, click the window's **close button**

-or-

From the menu of the HelpAlert List View, choose $\ensuremath{\textit{File}}$, then $\ensuremath{\textit{Exit}}$.

-or-

Right-click the GoToAssist system-tray icon and select Exit.

2. In the HelpAlert confirmation window, click **Yes**.

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🔯 HelpAlert Notice 🛛 🛛 🔀
Do you really want to quit?
Yes No

HelpAlert Password

The representative can change his/her password from within HelpAlert. The representative will be required to change the password at regular intervals, as defined in the GoToAssist Management Center.

To change a HelpAlert password

From the *Options* menu on the HelpAlert List View or the System Tray, choose **Change Password**. The Change Password Web page opens.

- 1. In the Login field, enter the HelpAlert login in email format.
- 2. In the *Current Password* field, enter the current password.
- 3. Enter the new password. The new password must be between 8-32 characters and contain at least three of the following four items: uppercase alphabet [A-Z]; lowercase alphabet [a-z]; numbers [0-9]; or special symbols [~`!@#\$%^&*()_-+={}[]\:;"'<>,.?/]. Passwords must *not* be the same as the login name or the actual first name or last name on the representative's account.
- 4. Re-type the new password.
- 5. Click Submit.
- 6. Exit HelpAlert and log in using the new password.

Forgot Account Password

If you forget your Account Password, you will need to create a new Account Password.

To create a new Account Password

From the HelpAlert Login window, choose Forgot your password?

- 1. In the Login field, enter the HelpAlert login in email address format.
- 2. Re-type the login in email address format.
- 3. Click Submit.

An email will be sent to your email address with a link to create a new Account Password.

4. Go to your email and click the link to create a new Account Password.

A Web page will generate, where you can enter your new Account Password.

- 5. Enter your new Account Password.
- 6. Re-type your new Account Password to confirm.
- 7. Click OK.

Note: The email address must be validated in order to receive the Forgot Password email.

Upgrade HelpAlert

The HelpAlert software has a built-in auto-update feature that checks for the latest version of the HelpAlert software each time the representative logs in. If the system detects that a new version of the software is available, it will prompt the representative to update his/her version. When Citrix Online no longer supports previous versions of HelpAlert, the representative will be forced to upgrade.

To complete the auto-update

1. Log in to HelpAlert. When a new update is available, a pop-up message prompts you to receive the new update. Click **OK** to accept the update.

HelpAlert installs the update.

2. Click **OK** to close the prompt window, and then log in to HelpAlert again.

Additionally, a representative may obtain a new copy of the HelpAlert.exe at the following Web site: <u>http://www.gotoassist.com/haupgrade</u>

To download HelpAlert from the upgrade site

- 1. Log in to the Download Center with the HelpAlert login and password supplied by Citrix Online or your manager.
- 2. Save HelpAlert to the desktop or another convenient location.
- 3. Log in with the same login and password.
- 4. This needs to be done only once for the representative.

Note: The auto-update configuration can be disabled upon request.

HelpAlert List View

Once you have logged in to HelpAlert, the first thing that appears is the HelpAlert List View.

The primary use of the List View is to enable the representative to check the status of queries. For this reason, the List View has several fields and status states that indicate session and customer information.

The List View is divided into the following sections:

- Toolbar
- Incoming Queries
- In Session
- Session History
- Details
- Connection-Status Panel

-	🕈 🔋 Availa	ble •				
- Incomi	ng Queries					>
Timer	Portal	Session ID	Posted	Name	Language	Query
<)		
🕶 In Ses	sion					>
Timer	Portal	Session ID	Posted	Name	Language	Query
<)		
- Sessio	n History					>
Session ID	Start Time	End Time	Resolution	Portal	Name	Language
<						
- Details						>

HelpAlert List View Toolbar

Representatives can customize the HelpAlert view to show only certain areas of the List View.

- Select which sections to display in the list view (a)
- Click to access the Preferences list (b)
- Click to access the SmartCode menu (c)
- Toggles *Available* and *Not Available* modes to pause new incoming queries (d)

	🙆 G	oToAssis	st - tra	iningre	present
	<u>F</u> ile	<u>O</u> ptions	⊻iew	Codes	<u>H</u> elp
a ——	=	• 🎯		🔋 Avail	able 🝷
		b	С	d	l

Incoming Queries

The Incoming Queries section shows all customer queries that have not yet received a response. The Timer field icons help the representative identify query status.

🙆 G	oToAssis	t Corpo	orate -	mo@g2a.com	connected to eg	wqa3.gotoassist.	com	
<u>F</u> ile	<u>O</u> ptions	⊻iew	<u>H</u> elp					
	- 88	•	Availabl	e -				
v li	▼Incoming Queries X							
Timer	Po	ortal		Session ID	Posted	Name	Language	Query

In Session

The In Session section shows only the sessions the representative has replied to and is personally handling.

🔽 In Ses:	▼ In Session						
Timer	Portal	Session ID	Posted	Name	Language	Query	
≣ ∰52:36	G2A	10000000004	15:40:57	Joe	English	Please help me with my technical issue.	
<						>	

Session History

The Session History section shows only the sessions the representative has completed and includes details about start time, end time and session resolution.

Session History						×	
Session ID	Start Time	End Time	Resolution	Portal	Name	Language	Query
8 10000000045713110	Wed Feb 25	Wed Feb 25	Resolved	G2A	Joe	English	Please help me
<]		>

Details

The Details section gives a comprehensive view of a selected session. A session is selected for display in the Details section by clicking on the session line item in either the Incoming Queries section or the In Session section.



HelpAlert Field Definitions

Incoming Queries and In Session Column Definitions

Timer : (Incoming Queries)	Displays a color-coded icon and a countdown timer showing time left to respond to the query
Timer: (In Session)	Displays a color-coded icon and timer indicating session status and length
Portal:	Shows the portal name from which the customer query was posted
Session ID:	Unique session number assigned by Citrix Online
Posted:	The time the customer query was originally posted
Name:	The name of the customer (if available)
Language:	The language setting for the portal from which the customer query was posted
Query:	The question text of the customer's questions (available only with SmartBox portals)

Incoming Queries Timer Column Icon Definitions

8	New: A new customer-query posting
8	Caution: A query that has not been responded to within the designated time
7	Warning: A query that has not been responded to within the designated time
	Queued: A query to which the representative replied Yes , but the representative cannot respond because the max limit for simultaneous sessions has been reached. The customer receives a message indicating that he/she needs to wait until the representative has finished helping the previous person.

Note: Please see List View preferences on the following pages to adjust time settings for these displays.

In Session Timer Column Icon Definitions

٢	Indicates customer is downloading
-41-	Indicates customer is connecting
P	Indicates customer and representative are in a chat-only communication
	Indicates customer and representative are in a Share Customer's Screen connection
	Indicates customer and representative are in a Share My Screen connection

List View Preferences

The representative has the option to set various preferences for Alerts, the List View, ChatLink and the Viewer window.

To set the preferences

• From the List View Options menu, choose Preferences.

Alerts Preferences

Pop-Up Alerts:

This section enables the representative to determine settings for the first popup Alert of a customer query. **Reminder Pop-Up Alerts** apply to queries if a representative does not respond to an initial Alert.

When not in session:

When no sessions are in existence or being initiated.

When in session:

When the representative is in a minimum of one session.

When sessions are maxed:

When the maximum number of simultaneous sessions has been reached.

HelpAlert Preferences

Warning Levels:

Enables determination of icon reminder settings in the Incoming Queries section of the List View.

Update List:

Determines how often HelpAlert polls the Citrix Online servers.

Column Display:

Enables selection of which fields to display in the Incoming Queries and In Session sections.

ategory	Alerts		
Alerts	Pop-up Alerts		
HelpAlert Chat /iewer	Incoming queries will s	how a pop-up alert for 30	seconds.
Host Shared Clipboard	When not in session:	When in session:	Maximum concurrent sessions reached:
	✓ Play sound	Play sound	Play sound
	Show Alerts	Show Alerts	Show Alerts
	Remind after 60	seconds and show for	30 seconds.
	Remind after 60 When not in session:	When in session:	Maximum concurrent
	When not in	When in	Maximum concurrent
	When not in session:	When in session:	Maximum concurrent sessions reached:

Incoming Query Settings P Seconds before incoming queries turn yellow: 80 P Seconds before incoming queries turn red: 30
Update queries every 5 💌 seconds.
Column Display Incoming Queries Timer Portal Session ID Posted Name Language Query Column Display Check the columns you want displayed in the list to the left. Drag an item up or down to alter column order. Reset to Defaults

Chat Preferences

Chat Settings:

Enables selection of preferences that affect the representative Chat box. Seconds determine how long since the representative last typed and submitted text to the customer in Chat. Icons start as Green.

Chat Start Mode:

Enables selection of the Chat Start Mode to be Expanded or Collapsed.

From Management Center:

Provides the maximum number of simultaneous sessions as defined in the GoToAssist Management Center.

🚇 GoToAssist - Hel	pAlert Preferences	×
Category Alerts	Chat	
HelpAlert Chat Viewer Host Shared Clipboard	Chat Settings Seconds before tabs turn yellow: 60 Seconds before tabs turn red: 60	
	Default font size: 8 point	
	Maximum number of concurrent chats: 8	
	OK Cancel	

Viewer Preferences

Screen Size:

Enables configuration of how the Viewer window displays the shared desktop while in session.

Viewer Options:

Start incoming sessions in separate Viewers: Starts each new session with its own Viewer Window instead of combining the viewer windows and separating by tabs.

Dim Viewer: Deactivates the Viewer window when it is not the focused window, providing a shaded transparency.

Pass Windows Keys: Allows some Windows key functionalities to be passed to the remote PC (or Local), such as PrintScrn.

Enable Viewer Hot Keys (F10, F12, etc.): Activates keyboard Hot Keys for Draw and Laser tools.

Don't Show Multi-Monitor Prompt: Toggles the automated prompt which displays the multi-monitor shortcuts when connected to a customer with multiple monitors.

🕽 GoToAssist - He	IpAlert Preferences	>
Category	Viewer	
Alerts HelpAlert Chat Viewer	Screen Size	
Host Shared Clipboard	C Full-screen Mode C Actual Size C Window Mode C Scale-to-fit	
	Viewer Options	
	Dim Viewer when inactive Enable Viewer Hot Keys (F8, F9, etc.) Pass Windows keys to remote computer (Alt-Tab, Menu, etc.) when connecting to a customer	
	Select Viewer Color	
	OK Cancel	

Note: To enable use of keyboard Hot Keys for GoToAssist tools like the Highlighter (F8), Arrow Stamper (F9), and Pen (F11), be sure to select the Enable Viewer Hot Keys option. This also maps the arrow keys and the keypad number keys for use in screen navigation.

Host Preferences:

Color Quality:

True Color:

Select True Color for better appearance.

256 Colors:

Select 256 Colors for better speed.

Performance Settings:

Check to disable each of the following display options for better speed.

Disable display effects

Disable desktop wallpaper

Disable font smoothing

Don't show window contents while dragging

Availability Preferences

Automatically change to *Not Available*:

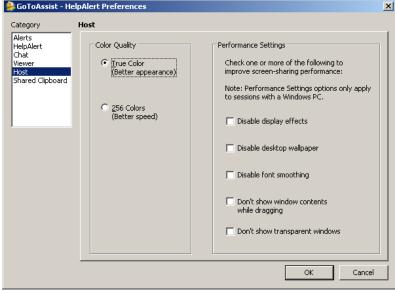
Enables automatic entry into *Not-Ready Mode* at the conclusion of each session. The representative will be prompted to re-enter *Ready Mode*.

Show me a pop-up alert:

Enables a Not Available pop-up to show after the number of seconds that the representative is in *Not Available Mode*. This reminds the rep that the *Not Ready Mode* is activated.

GoToAssist	HelpAlert Preferences Availability
Alerts List View ChatLink Viewer Host <u>Availability</u> Shared Clipboard	Availability Settings Automatically change to Not Available after each session. When Not Available, Show me a pop-up alert.

Note: A representative's ability to edit these settings depends upon the specific GoToAssist configuration.



Shared Clipboard Preferences

Select which action to take when clipboard data is received from your customer.

Display a prompt to share data to the local clipboard

Automatically copy data to the local clipboard

Automatically decline the data. Does not copy to the local clipboard

Category	Shared Clipboard
Alerts HelpAlert Chat Viewer Host Shared Clipboard	Shared Clipboard Settings When I receive clipboard data: Ask me if I want to copy the data to my local clipboard Automatically copy the data to my local clipboard Reject it automatically Note: These settings affect new sessions only.
	OK Cancel

Connect with a Customer Using Standard or Queue Mode

To connect to the customer and provide support with a Standard or Queue Mode configuration, you must first reply to the customer query. This is accomplished by both receiving and replying to an Alert. If the Alert clears off the desktop before you respond, you can respond via the Incoming Queries section of the List View.

▶ To reply to the customer query via the pop-up Alert

On the bottom of the Alert, click Yes.

This completes the initial validation of the query and prompts the customer to begin the download of the customer's component of GoToAssist.

Time: 10:	36:47	393		
Portal: M	os			
Languag	e: English			
Do you v	vant to co	nnect w	ith this C	ustomer?
	Yes		No	
			140	

► To reply to the customer query via the List View

In the Incoming Queries section of the List View, doubleclick the line item for the desired query. This re-launches the Alert on the representative's desktop.

On the bottom of the Alert, click Yes.

This completes the initial validation of the query and prompts the customer to begin the download of the customer's component of GoToAssist.

<u>File</u> <u>O</u> pti	ions ⊻iew Co	les <u>H</u> elp			
- 🧃	iii 📷 🛛 🖲 /	Available 🔻			
 Incomin 	ig Queries				>
Timer	Session ID	Posted	Name	Language	Query
P 236	37951282	16:04:36	Marsha	English	4054091

Portal: Mos Language: English Do you want to connect with this Customer?	Language: English	Session ID: 37 Time: 10:36:47			
		Portal: Mos			
Do you want to connect with this Customer?	Do you want to connect with this Customer?				
		Do you want t	o connect v	vith this Cu	istomer?
(<u>Y</u> es) <u>N</u> o					-

Connect with a Customer Using SmartCode/PhoneMode

To connect to the customer and provide support with a Phone Mode configuration, the representative must first generate a connection code PIN number and then convey that number to the customer to enter into the support session. This is accomplished by generating a new connection code via HelpAlert and conveying the code to the customer by phone or by sending the code link by email or third-party chat.

Note: Depending upon the GoToAssist configuration, either the HelpAlert List View (Figure A) or the system-tray icon (Figure B) appears for the representative.

• To generate a Phone Mode SmartCode connection code

- 1. Log in to HelpAlert. Either the List View or the system-tray icon is displayed.
 - a. List View or -Click the phone icon.

b. System tray

Double-click the question-mark bell icon, or rightclick it and choose **Code Management**.

🙆 G	oToAssis	st - mo	@citrix.	com conn
<u>F</u> ile	<u>O</u> ptions	⊻iew	Codes	<u>H</u> elp
	- 88(
▼ In	coming Qu	eries		
Timer	👻 Po	rtal	Sessio	n ID

4:16 PM

2. Choose the default numerical value assignment, **or** assign the code a name (usually the name of the customer). Choose the appropriate portal.

3. Click Create Code.

Name	Code	Portal	Status	Time	Quic
Customer [001]	658-5027	G2A Phone	Active	04:03 minutes	http
<					>
Copy Quick URL Create Code Name: Customer		de Portal: G2A F	'none	Create	e Code

To convey the connection code via email or third-party chat

- 1. Click the Copy Quick URL button.
- 2. In the desired communications tool, email or third-party chat, paste the connection-code URL and send it to the customer.
- 3. The customer clicks the URL and is then routed through the download process.

To generate multiple Phone Mode SmartCode connection codes

1. From the Code Management window click Create Code.

Codes may be generated and redeemed up to the maximum limit allowable. The codes remain active until they are redeemed or time out.

Active Codes	Aode - Code Mar	ugement			
Name	Code	Portal	Status	Time	Quic
Customer [006]	865-9699	G2A Phone	Active	04:56 minutes	http:
Customer [005]	902-1310	G2A Phone	Active	04:56 minutes	https
Customer [004]	273-4281	G2A Phone	Active	04:56 minutes	https
Customer [003]	316-3660	G2A Phone	Active	04:56 minutes	https
Customer [002]	071-8513	G2A Phone	Active	04:55 minutes	https
Copy Quick URL	Cancel Code	3			
5,04,0 0040					
Name: Customer	[007]	Portal: G2A P	hone	Create	Code
					Close

The Viewer Window

The Viewer window is the window in which the shared desktop appears. The Viewer window can be minimized, resized and moved just like any other application window. In most configurations, when screen sharing begins, the Viewer allows you to immediately begin sharing control of the customer's mouse and keyboard just as if you were sitting at the customer's computer.



List of Viewer Window Hot Keys

For Viewer Hot Keys to work, they must first be enabled in the Preferences.

Send Clipboard P6 Sends your clipboard to your customer, allowing you to paste your clipboard da your customer's machine.		Sends your clipboard to your customer, allowing you to paste your clipboard data to your customer's machine.	
Highlighter	F8	Toggles in and out of the Highlighter mode.	
Arrow Stamper	F9	Toggles in and out of the Arrow Stamper mode.	
Chat	F10	Changes for focus to or from the representative ChatLink window	
Pen	F11	Toggles in and out of Draw mode	
Erase	F12	Erases drawings	
Shared Mouse/Keyboard	Esc	Turns off the drawing tool. Returns you to a shared mouse/keyboard state.	

Viewer Window Session Menu

To close the Viewer Window

If you would like to close the Viewer Window and still remain in a session with your customer:

Click the Windows close button in the upper-right corner of the Viewer Window.

-or–

- From the Viewer Window menu select **Session**, then select **Close Session**.
- To end the session with a customer
 - 1. Ensure that the you have returned the customer's desktop to its original state, then either:
- Click the Windows close button in the upper-right corner of the Chat Window.

-or–

- Click Session in the Viewer Window menu or the Chat Window menu then select Close Session. To end all of your active sessions select Exit All Sessions.
 - 2. Depending on configuration, you may be prompted to select the resolution state of the session with the customer. Select the appropriate option:
- **Resolved Session** means that you felt that you were able to solve the customer's query.
- Unresolved Session means that you did not feel that you were able to solve the customer's query.
- Unknown should only be selected if you are not sure if you were able to assist the customer
 - 3. An additional field may appear in the End Session box, requesting further information such as ticket number or case ID. If so, enter the additional information.
 - 4. Click **OK** to submit the resolution status.
 - 5. Return to the HelpAlert Inbox and begin answering the next query.

Note: Please follow your organization's guidelines for ending a session prior to closing the Chat connection. You may be presented with a feedback form following the session.

To leave a customer session

- 1. Verify another representative has joined your session via the Invite to Session feature.
- 2. From the Viewer Window or Chat menu select Session, click Leave Session

_	
	Close ⊻iewer
	Invite to Session
	- <u>T</u> ransfer Session
	Leave Session
	<u>C</u> lose Session
	Exit <u>A</u> ll Sessions

Close ⊻iewer
Invite to Session
Transfer Session
Leave Session
<u>C</u> lose Session
Exit <u>A</u> ll Sessions

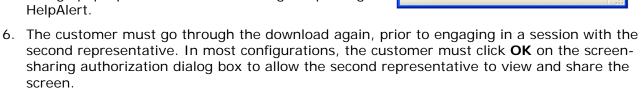
Transfer Session

Session Transfer enables you to transfer a customer session to another portal or representative who can further assist the customer. Customers stay connected to support representatives throughout the escalation process so they do not have to repost their support query.

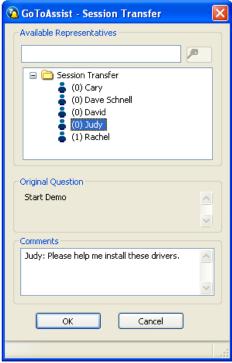
Note: Session Transfer is an additional configuration option that will not apply to all GoToAssist implementations.

To transfer a session to another representative

- 1. During the session, select the Transfer Session icon where we will a second Window or Chat Window select the Session menu, then click Transfer Session. The Transfer Session dialog box appears.
- 2. The Available Representatives window opens.
 - a. Click the + sign to expand a portal and show the available representatives, and then choose a representative. -or-
 - b. Click a portal to broadcast the posting to all available representatives.
- 3. The original question posted by the customer may appear in the Comments field. This text can be altered or appended to assist the next representative in resolving the issue. Click **OK**.
- 4. If an entire portal is selected, all representatives logged in and available within this portal will receive the request. The *Question* field of HelpAlert displays your log-in name. The comments are viewable for the next representative in the pop-up Alert and the posting in HelpAlert.
- 5. The representative who wishes to accept the transferred session replies by clicking **Yes** on the orange pop-up Alert or double-clicking the posting in HelpAlert.



7. The second representative can view the comments entered by the first representative in the Question field of the Chat box.





Invite to Session

Invite to Session enables you to invite additional representatives who can further assist with the remote session. The invited representatives can be masked **set** so that the customer is unable to see them or viewable **a** additional attendees in the session.

Note: Invite to Session is an additional configuration option that will not apply to all GoToAssist implementations.

To invite additional representatives to the session

- 1. During the session, select the Invite to Session icon on your Viewer Window or from the Viewer Window or Chat Window select the **Session** menu, then click **Invite to Session**. The Transfer Session dialog box appears.
- 2. The Session Collaboration Screen will open.
 - a. Search for a specific representative.
 - b. Click the + sign to expand a portal and show the available representatives, and then choose a representative.

-or–

- c. Click a portal to broadcast the posting to all available representatives.
- 3. Choose whether the invited representative is visible or hidden from the customer.
 - a. A **T** icon will be shown next to masked representative names, but they will not appear in the Customer Chat window.
 - b. A i icon will be shown next to unmasked representative names.
- 4. The original question posted by the customer may appear in the Comments field. This text can be altered or appended to assist the next representative in knowing the issue. Click **OK**.
- 5. The invited representative(s) will receive a blue alert dialog box which includes the comments given by the inviting representative.

The representative who wishes to accept the invite session replies by clicking **Yes** on the blue popup Alert.

🔞 GoToAssist - Session Collaboration 💦 👂	
Available Representatives	
James 🔎	
Mo's Web Mode Portal [Not Available] MoCompany [Reps Only] (0) James Thomas	
Mask representatives when they join Original Question Session Initiated	
Comments	
James: I need some help with a database re-build. Can you join the session and give me some tips?	
OK Cancel	
	.;;

Viewer Window View Menu

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

- Window mode: The Viewer appears as a window on your desktop just like any other application. You will always able to see the Viewer menu and the Windows controls in the upper-right corner of the screen as well as able to resize the Viewer window just like any other application window.
- **Full Screen mode:** The Viewer expands to full screen and the menu auto-hides at the top of the screen. A tab the same color as the Viewer window is displayed at the top of the screen; hovering the mouse over this tab displays the full menu.

To switch to Full Screen mode

 From the Viewer Window menu, select View, then Full Screen. This expands the Viewer window to Full Screen.

To switch to Window Mode

- 1. Move the mouse over the **Viewer window tab** at the top of the screen. The Viewer menu displays.
- 2. Select View, then Normal.

This cancels the selection of Full Screen mode and returns it to a resizable Viewer window.

To Resize the Desktop Image

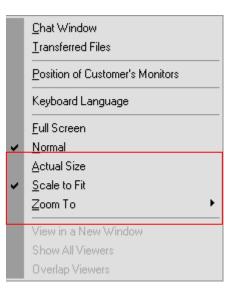
You can choose to change the size of the image of the shared desktop within the Viewer and has the option of choosing to adjust the image size to Actual Size, Scale to Fit or Zoom To.

Actual Size: Displays the actual image of the desktop within the Viewer and may require scrolling.

Scale to Fit: Displays the image of the shared desktop scaled to fit the entire image within the Viewer.

Zoom To: Allows the representative to zoom the image to a setting of his/her choice. Choose from several pre-set options or choose a custom option. This selection may require scrolling.

	<u>C</u> hat Window
	Transferred Files
	Position of Customer's Monitors
	Keyboard Language
	<u> </u>
\$	<u>N</u> ormal
	<u>A</u> ctual Size
4	<u>S</u> cale to Fit
	Zoom To ►
	View in a New Window
	Show All Viewers
	Overlap Viewers



• To View Multiple Monitors

When you connect to a customer who has multiple monitors the layout of the customer's computer monitors will appear. In addition, the number of monitors and resolution of each monitor will be displayed. You can view the layout of your customer's monitors by selecting **Position of Customer's Monitors**.

Arrows appear on the viewer window when adjacent monitors are present. Click the arrow buttons to navigate to the other screen.

To display a minimap layout of the multiple monitors hit the Ctrl + Windows Logo Key + Left Mouse Click

► To Navigate the Desktop Image with Auto-Scroll

If the desktop being shared is larger than the Viewer window while in Actual Size, a confirmation box will inform the representative. To navigate the image, move the mouse to the edge of the Viewer window in the direction desired and the customer's entire desktop image will auto-scroll within the Viewer. If Viewer Hot Keys are enabled in the preferences, the representative can also use the arrow keys on the keyboard.

► To Detach the Viewer Window into Separate Windows

If you are in multiple sessions with multiple customers, you can detach the Viewer Window into a separate window. When a Viewer Window is detached, you can overlap the Viewer Windows, position them side-by-side, or display them on different monitors.

To arrange detached Viewers

From the **View** menu in the Viewer Window, select **Show All** to display all Viewer Windows. This will fit all of your Viewer Windows onto the screen. Select **Overlap Viewers** to display all of the Viewer Windows in an overlap display.

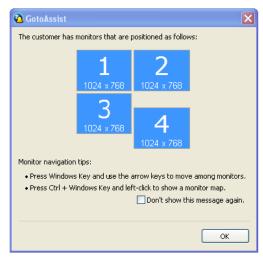
To View Transferred Files

• From the Viewer Window or Your Chat menu, select View, then select Transferred Files.

Viewer Window Tools Menu

File Transfer

File Transfer enables the representative and customer to exchange files from PC to PC. 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.



	<u>F</u> ull Screen
~	<u>N</u> ormal
	Actual Size
~	<u>S</u> cale to Fit
	Zoom To
	View in a New Window
	Show All Viewers
	Overlap Viewers

Citrix[®] **GoTo**Assist[™] Corporate Representative User Guide For security and privacy purposes, the sender of a file must initiate the transfer (the representative can send a file from the customer's computer using screen sharing) and the recipient must accept the file for the transfer to occur.

To send a file to your customer

1. From the Viewer Window or Representative Chat Window's **Tools** menu click **Send Files to** -or-

From the Representative Chat box or Viewer window, click the witton.

- 2. Select which person to send the file to.
- 3. Browse to the location of the file or folder you would like to send.
- 4. Select the file or folder. (Multiple files or folders may be selected by pressing Shift or Ctrl on the keyboard.)
- 5. Click Send.
- 6. Your customer can place a check mark next to the files they would like to receive.
- 7. Click **Browse** to change the storage location and click **Receive**.
- 8. The transfer-status notifications will appear during and upon completion of file transfer.

To send a file from customer to representative

- 1. From the Tools menu of the Customer Chat box, select Send Files or click the we button.
- 2. Select the file(s) or folder(s) and click **Send**.

Click **Browse** to choose a location to save the file and click **Receive**.

3. The transfer-status notifications will appear during and upon completion of file transfer.

Shared Clipboard / Copy & Paste

The share clipboard feature allows you to copy and paste data between your machine and your customer's machine. The clipboard can contain up to 1.5mb worth of data or images. The clipboard can be shared in both directions dependent on your <u>Clipboard Preferences</u>.

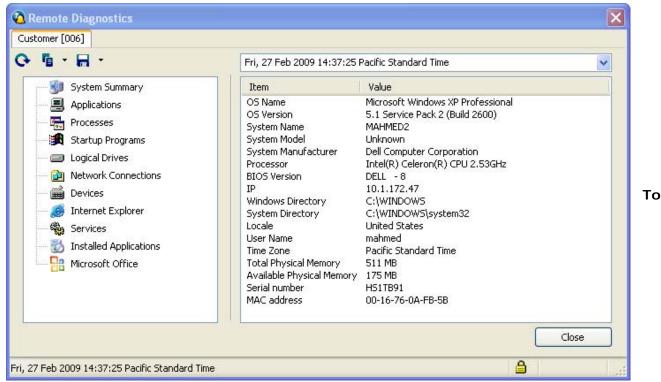
To Copy & Paste between computers

- 1. Select the data you would like to send to the customer and select copy on your machine.
- From the Viewer Window or Chat Window menu select **Tools** then select **Send Clipboard** or click the button.
- 3. Your customer's machine will now have the clipboard data. Select Paste.

Viewer Window System Menu

Request System Information

Request System Information enables a representative to access specific system information on the customer's PC. All data shown in the Diagnostics screen is read-only. No system changes can be made through the Remote Diagnostics.



request system diagnostic information

1. From the Viewer Window select System then select Request System Information or click the

button.

- 2. Customer is then requested to authorize this display of information by clicking **OK**. The customer can click **Cancel** to deny the display of this information.
- The customer can click View to review the information first and then either click Send Information to authorize the display to you or select Copy to Clipboard (to copy into text document for further analysis). If the customer clicks Close, the information will not be sent to you.
- 4. The customer can also display his/her own system information from the Tools menu of the Chat. The system information cannot be sent to you unless you requests it.
- 5. You can click **Copy to Clipboard** or right-click one item in the right column and click **Copy**. This allows pasting all or specific information.
- 6. To update the information, you can click **Refresh**. The customer is requested to authorize the display.

Note: Once requested, the diagnostic data will be logged in the GoToAssist Management Center.

Running as a Service

The Run as a Service feature enables you to run GoToAssist Corporate at an administrator level on your customer's machine. Additional commands such as Send Ctrl-Alt-Del, Reboot and Reconnect into

Citrix® GoToAssist™ Corporate Representative User Guide Safe Mode, and Request Login Credentials become available when running as a service during a session.

Note: Run as a Service is an additional configuration option that will not apply to all GoToAssist implementations.

To run GoToAssist as a service

- 1. From the Viewer window System menu, select Run as a Service.
- 2. You must confirm running GoToAssist as a service by selecting Yes.
- 3. If the customer is not logged in with administrator rights, GoToAssist will prompt the customer to log in with the proper credentials of a local or domain administrator.
- 4. The Viewer window will temporarily show an initializing message as the session restarts in Service Mode.

🔞 GoTo#	ssist	\times
Ø	Initializing	

5. Once GoToAssist is running as a service, you will have the ability to use the other tools listed in the **System** menu.

Note: Running GoToAssist as a service will not violate or circumvent the security model on the customer's PC.

Reboot/Reconnect

To aid with software installation and upgrades, the representative can initiate a shut-down, restart and reconnection of the customer's computer. Initiating the reboot and reconnect from the GoToAssist Chat box enables the customer to reconnect to the representative without having to post another query or download the GoToAssist software again. If GoToAssist is running as a service on your customer's machine, you will also have the option to Reboot and Reconnect into Safe Mode. This will reboot your customer's machine into Safe Mode with Networking and will automatically reconnect you when the machine boots up.

Note: For the GoToAssist reboot to work properly, the representative must initiate the Reboot/Reconnect from the GoToAssist Chat box or Viewer Tools menu, and the customer must keep his/her Chat box open, as the system will close the customer's Chat box for him/her. If Windows or a program installer prompts a "restart for changes to take effect," the representative should choose not to restart from this dialog box, but instead use the reboot feature in the GoToAssist Chat box.

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

1. During the session, from the Viewer Window System menu select Reboot and Reconnect or click the button.

- 2. Click **OK** to confirm the customer Reboot/Reconnect.
- 3. Depending on configuration, the customer may or may not receive a request to Reboot/Reconnect, which you will see in the Viewer window. Either the customer or you can click OK to authorize the Reboot/Reconnect and begin the reboot process if presented with the authorization message. If Cancel is selected, you will receive a denial message, the Reboot/Reconnect does not occur and the incident is documented in the Chat boxes.
- 4. You will receive a message confirming the customer's computer is rebooting and the session will reconnect after the reboot. Clicks **OK**, the Viewer window closes, and your Chat box remains open.
- 5. When the customer's computer has rebooted and the customer's Internet connection resumes, a message may or may not (depending on configuration) ask the customer if he/she wishes to reconnect to you. The customer clicks **Yes** if presented with the authorization message.
- 6. You will receive a message informing him or her that the customer has reconnected to the session and clicks **OK**. The Viewer window opens on your desktop.
- 7. Depending on configuration, the customer may or may not be presented with the screensharing authorization request. The customer clicks **OK** if presented with this request.

Note: If the customer has a dial-up Internet connection, the customer needs to initiate the process prior to the continuation of the GoToAssist session. Windows may prompt the customer to reconnect to the Internet, depending on the configuration of the customer's connection settings. The session will time out if not reconnected within 10 minutes.

Note: In Phone Mode, the representative receives a dialog window which allows the representative to cancel the reconnection. Clicking cancel or closing this dialog window cancels the current session, as well as the reconnection of the session.

Request Login Credentials

This feature allows you to request and use the customer's login credentials in order to reboot or unlock your customer's computer for the current support session only. It is useful if your customer needs to leave their computer to go out to lunch, attend a meeting, or even go home for the night because it allows you to continue working when you're customer is not in the office. The Password is securely encrypted on only the customer's computer. You will never be able to access or see your customer's password. Neither will GotoAssist. Your customer can disable this feature at any time by clicking **Tools** and then **Revoke My Credentials** in their viewer window.

To request Login Credentials

- 1. From the Viewer Window select the **System** menu.
- 2. Select Request Login Credentials
- 3. Have the customer enter their Username and Password for their Windows machine.
- 4. All of the data will remain encrypted throughout the session and will be automatically deleted at the end of the support session.

Viewer Window Draw Menu

The Viewer window has annotation tools that can be used to facilitate the support session by drawing on the screen. Use these annotation tools to assist you when guiding your customer through steps and processes during your support session.

To draw on the screen

- From the Viewer Window's Draw menu, select
 Pen; or if hot keys are enabled, press F11 on the keyboard. The mouse changes to resemble a pen.
- Press and hold the left mouse button while dragging the mouse. Drawing appears in blue.
- Hold the shift key while dragging the mouse to draw in a straight line.

Mouse Pointer (no drawing)EscPenF11HighlighterF8Arrow StamperF9Erase DrawingsF12

R.	Mouse Pointer(no drawing)	Esc
Ø	Pen	F11
Ø	Highlighter	F8
8	Arrow Stamper	F9
0	Erase Drawings	F12

k	Mouse Pointer(no drawing)	Esc
Ø	Pen	F11
Ø	Highlighter	F8
8	Arrow Stamper	F9
0	E <u>r</u> ase Drawings	F12

To highlight on the screen

- From the Viewer Window's Draw menu, select Highlighter; or if hot keys are enabled, press F8 on the keyboard. The mouse changes to resemble a highlighter
- Press and hold the left mouse button while dragging the mouse. Highlighting appears in yellow.
- Hold the shift key while dragging the mouse to highlight in a straight line.

• To place an arrow stamp on the screen

- From the Viewer Window's Draw menu, select Arrow Stamper; or if hot keys are enabled, press F9 on the keyboard. The mouse changes to resemble an arrow.
- Click the left mouse button to stamp an arrow.

To return to shared mouse and keyboard mode

• From the Viewer Window's **Draw** menu, select **Mouse Pointer (no drawing)**; or if hot keys are enabled, press **Esc** on the keyboard. The mouse will change to its normal state.

To erase drawings, highlights, arrow stamps

• From the Viewer Window's **Draw** menu, select **Erase Drawings**; or if the hot keys are enabled, press **F12**. This will erase all annotations made in the Viewer Window.

Customer Chat Box

There are five parts to the Customer Chat box: the Menu bar, the Toolbar, the Chat display area, the message-entry box and the status panel.

Menu bar: ____× GoToAssist The menu bar gives the customer (and а Eile ScreenSharing Tools Help when in Share Customer's Screen, the representative) access to various menu н . D, btools and commands. (a) > Your representative has arrived. > customer john accepted request to share screen. Toolbar: С Tool buttons for common tasks. (b) Chat display area: The large area in the middle of the Chat box displays the entire Chat dialog between the representative and the customer. All pushed Web pages and file transfers are also documented here. (c) d -Message-entry box: A 1:13:51 Your screen is being viewed. е. The Entry field at the bottom of the Chat box lets the customer

type and submit messages to the representative. (d)

Status panel:

Provides information about the status of the customer's connection with the representative. (e)

Customer Chat Box Tools

The Customer Chat box contains tools that can be used during a support session.

Chat Log

The Save Chat Log feature enables the representative or the customer to save all text in the Chat box, including pushed Web pages and files transferred.

To save the Chat log

- 1. From the Customer Chat box menu, select File, then Save Chat Log.
- 2. Chose a name for the Chat log and browse to a location to save the file (desktop is recommend).
- 3. Click Save.

The Chat log is saved as a text file and is available for the customer to reference after the support session.

Note: The Chat log is saved in the GoToAssist Management Center, whether it is saved for the customer or not.

Screen Sharing

The customer can stop ScreenSharing from the Customer Chat box.

To stop ScreenSharing

- On the Customer Chat box, select ScreenSharing, then Stop ScreenSharing.
- The customer can also click the **I** button on the toolbar in the Customer Chat box.

Note: ScreenSharing can be stopped by the customer, but it must be restarted by the representative.

To pause ScreenSharing

- On the Customer Chat box, select ScreenSharing, then Pause ScreenSharing.
- The customer can also click the **III** button on the toolbar in the Customer Chat box

Annotation Tools

The Annotation tools allow the customer to draw and highlight on the screen.

To use the Annotation Tools

- Click the **ScreenSharing** button in the Customer Chat box or Click the **button** on the toolbar in the Customer Chat box.
- Select an appropriate tool from the drop-down menu.

Show Diagnostic Information

Depending on configuration, the Customer Chat box may have a tool which allows him/her to view system information.

To view system information

• On the Customer Chat box, select **Tools**, then **Diagnostic Information**.

Citrix[®] **GoTo**Assist[™] Corporate Representative User Guide The customer can copy this information in its entirety to his/her clipboard by clicking the **Copy All to Clipboard** button or by individually selecting items to copy to the clipboard by right-clicking the item in the right pane and selecting **Copy to Clipboard**.

Note: The Customer Chat box will not allow transfer of the Diagnostic Information until it has been requested by the representative.

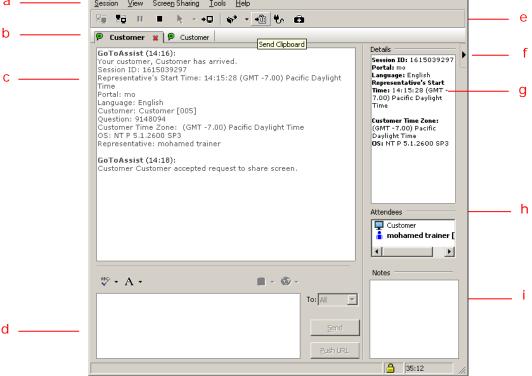
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Representative Chat Box (ChatLink)

Chat boxes automatically launch on your desktop as well as the customer's desktop when the connection process begins. Your Chat box is titled GoToAssist - Chat. In most cases, the Viewer window launches immediately following the launch of the Chat boxes. Depending on configuration, your Chat box may automatically minimize once ScreenSharing starts.

- U × 🛃 GoToAssist - Chat а Session View Screen Sharing Tools Help 20 **20** 11 ■ ト・・ロ お・・値 も 曲 b 👂 Customer 🙀 👂 Customer | Send Clipboard

There are ten components to the Representative Chat box. Each is shown below.



- Menu Bar: The menu bar gives you access to various menu tools and commands (a)
- Tabbed Interface: Enables you to easily manage multiple sessions (b)
- Chat Display Field: Displays the entire Chat dialog between you and your customer. All pushed web pages, file transfers, and other actions taken are documented here (c)
- Message Entry Box: This field lets you type and submit messages to the customer. Any spelling errors will automatically appear in red. Right click any misspelled words to see the correct spelling. (d)

- Toolbar: Tool buttons for common tasks (e)
- Display/Hide Details: Click the arrow to display or hide the Details, Attendees, and Notes field (f).
- Session Details: Provides details about the current session, including language, Operating System and start time (q)
- Attendee List: Lists all of the people that are part of the session (h)
- Notes: Allows you to type notes about the session. The notes are not visible to the customer (i)

Push URLs / Quick Phrases

The Push Url and Quick Phrases features allow you to quickly assist your customer during a support session. Your manager has the ability to preset each of the URL and Quick Phrases that are listed in your chat window. When the Push URL is used, it will open a new browser on your customer's computer and go to that URL.

To push a Web page

- 1. Type the desired URL address in the *Text Entry* field of the Chat window.
- 2. Click **Push URL** on the toolbar.

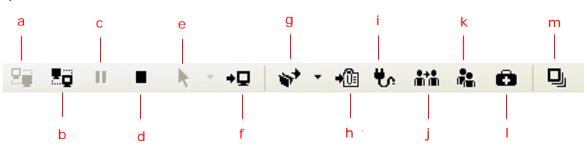
🎨 - A - 🛛 - 🚳 -	,
http://www.gotoassist.com	To: All
	Send
	Push URL
	04:34 //.

To send a Quick Phrase

- Select the Quick Phrase in the category you want to send from the drop down list.
- 2. Select Send.

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Representative Chat Box Tool Bar



- Share Customer's Screen (a)
- Share Your Screen (b)
- Pause ScreenSharing (c)
- Stop ScreenSharing (d)
- Use Annotation Tool (e)
- Change to Viewer Window (f)
- Initiate File Transfer (g)

- Send Clipboard to Customer (h)
- Reboot/Reconnect (i)
- Invite to Session (j)
- Session Transfer (k)
- Remote Diagnostics (I)
- Hide / Restore Chat (m)

Screen Sharing

Most GoToAssist sessions automatically begin in Share Customer's Screen mode. For sessions that do not automatically start in screen sharing, or that have discontinued screen sharing, the representative can manually initiate screen sharing at any time. In addition, the representative can stop and restart screen sharing at any point during the support session.

Screen sharing may be configured to be either viewing only, known as ScreenViewing, or with viewing and shared mouse and keyboard control, known as ScreenSharing.

In addition, screen sharing may be configured in Share Customer's screen, enabling sharing of the customer's desktop with the representative, or in Share My Screen, which enables the representative to share his/her desktop with the customer.

► To initiate Customer ScreenSharing

• Click the Share Customer's Screen icon and the Chat box toolbar, or from the Representative Chat box ScreenSharing menu, choose **Share Customer's Screen**.

This enables the representative to view the customer's desktop.

Note: When screen sharing is initiated, the customer may need to accept the screen-sharing download if configured; if this is not done, the representative will not be able to use screen sharing.

To initiate Share My Screen

• Click the Share My Screen icon and the Chat box toolbar, or from the Representative Chat box ScreenSharing menu, choose **Share My Screen**.

This will enable the customer to view the representative's desktop.

To Pause ScreenSharing

- From either Chat box menu, choose ScreenSharing, then Pause ScreenSharing.
 -or-
- From the Chat box toolbar, click the II button.

To end ScreenSharing/ScreenViewing

1. From either Chat box menu, choose ScreenSharing, then Stop ScreenSharing

-or–

2. From either Chat box toolbar, click the **I** button.

Note: When the representative or customer stops or pauses screen sharing, both the customer and representative are still connected via Chat.

Designating View-Only or Shared Control

Depending upon configuration, when Share My Screen or Share Customer's Screen begins, the authorization dialog prompts the level of sharing that may occur.

View-only Access:

This gives the person viewing the shared screen the ability to view the shared screen, and not move the mouse. The ScreenViewing session begins in either Draw Mode or Laser Mode, with the ability to draw or laser point on the shared screen.

Full Access:

This gives the person viewing the shared screen the ability to view the screen as well as share the mouse and keyboard. The person sharing his/her screen always has overriding control of the mouse.

💫 Start ScreenSharing - GoToAssist 🛛 🛛 🔀
You are about to show your screen. Please close any windows showing confidential information. You can stop screen sharing at any time from the ScreenSharing menu.
Please select the level of access you would like to grant: (It can be changed again during the session.)
• View-only Access
Full Access to Keyboard and Mouse
OK Cancel

In some configurations, the designation of view-only or full access can be changed during the session.

To toggle between view-only and full access

• From the Chat box menu of the screen being shared, choose **ScreenSharing** then choose **View-Only** or **Full Keyboard and Mouse**.

Tips for Success

- Know where HelpAlert is located and remember your login and password.
- Know the address of your support site in case you need to direct customers there.
- Be familiar with the GoToAssist flow and feature set; conduct practice sessions with your coworkers.
- Be familiar with the customer's experience so you can guide customers through the connection process.
- Be aware of your organization's guidelines about when and how to use GoToAssist.
- Use your organization's standard dialog and scripting.
- Always ask the customer's permission to share control of his/her mouse and keyboard.
- To increase customer confidence, show the customer how to end ScreenSharing.
- Use your Keyboard Job Aid to get comfortable with available features and functions.
- If Reboot/Reconnect is used, remember to initiate from the Tools menu of the Chat box and inform the customer to keep his/her Chat box open because it will close automatically.
- Always return the customer's desktop to its original state.
- Ask your customer to complete the feedback page at the end of the session.
- Complete your feedback page at the end of the session (if applicable).
- Access and review the training documentation.
 - o URL = <u>www.gotoassist.com/training</u>