Netopia eCare 4.5 Support Agent's Guide

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Contents

eCare Support Agent's Guide

Welcome to eCare!

Netopia's eCare system allows Support Agents to interact with customers, in real time, to efficiently identify and resolve technical-support and customer-service issues. As a Support Agent, you can use eCare's remote-access services to steer your customers and fellow employees to the Web pages and information they need, send them files and applications, and even observe or control their computers to help diagnose and resolve their problems. You can provide fast and efficient customer service and troubleshooting services for remote employees as if they were working in the same building.

Preparing to Use eCare

Before you can use eCare to support your employees and customers, you must receive a user name and password from your organization's eCare administrator. You also must make sure that your computer meets the minimum system requirements and security permissions to use eCare and connect to remote computers.

System Requirements

To sign in to the eCare system and connect to remote computers, you must have the following system software and security settings.

eCare System Requirements		
	Windows	**Macintosh**
Operating System	Windows 98 Second Edition, Windows 2000, Windows Me, Windows XP, Windows 2003	Mac OS X version 10.3.9 or greater eCare 4.5 runs on both PowerPC and Intel-based Macintosh computers
Web Browser	Internet Explorer 5.5 – 7.0	Safari 1.3 or greater

eCare System Requirements ***(continued)***		
	Windows	**Macintosh**
Browser Settings	Java, JavaScript, and ActiveX enabled Medium security or lower Cookies must be allowed (see "Browser Security and Privacy Settings" below)	Plug-ins and JavaScript enabled Cookies must be allowed (see "Browser Security and Privacy Settings" below)
Permissions	ActiveX control installation privileges (on Windows NT-based computers)	Administrator privileges on the local computer
Pop-Up Blockers	Pop-up blockers **must be disabled**	Pop-up blockers **must be disabled**

If your organization uses a proxy server to connect to the Internet, your computer must also use the correct proxy settings. Your system administrator will notify you if any settings need adjustment.

Browser Security and Privacy Settings

The easiest way to ensure a successful eCare connection is to set your Web browser Security setting to *Medium* or lower. Your Privacy setting must be *Medium High* or lower.

If you do not wish to alter your Security and Privacy settings, the simplest and most reliable way to prevent your browser's settings from interfering with eCare communications is to add your eCare server as a Trusted site. For example, if the URL for your eCare service is *http://help.netopia.com/support*, add *http://help.netopia.com* to your list of Trusted sites.

If you wish to use a *Custom* Security setting in your browser, however, you may set the following individual options instead of returning your browser to the *Medium* setting. (The customers you assist require the same security settings.)

Settings for Windows Computers

The following settings are accessible from the *Security* tab in the Internet Options dialog box. (To open the Internet Options dialog box, click the *Tools* menu and choose *Internet Options*.) Select the *Internet* content zone and click the *Custom Level* button. Make sure the following options are set correctly.

- Download Signed ActiveX Controls—Set to *Prompt*.
- Run ActiveX Controls and Plug-ins—Set to *Enable*.

- Use Pop-Up Blocker—Set to *Disable* (Windows XP only).
- Active Scripting—Set to *Enable*.

Cookie settings are accessible from the *Privacy* tab in the Internet Options dialog box. In the *Settings* area, make sure the slider is set to *Medium High* or below.

Settings for Macintosh Computers

The following settings are located on the *Security* tab in the Safari Preferences dialog box. Make sure the following options are set correctly.

- Under *Web Content*, make sure the *Enable Plug-ins* and *Enable JavaScript* options are selected.
- Under *Web Content*, make sure the *Block Pop-Up Windows* option is cleared.
- Under *Accept Cookies*, select *Always* or *Only From Sites You Navigate To*.

If you need to adjust your browser settings, see your Safari documentation for more information.

Pop-Up Blockers

All pop-up blocking software for your browser *must be turned off* before you can use eCare. This includes the pop-up blockers that are built in to Internet Explorer and Safari, as well as third-party blocking software for all platforms.

Sound Settings

On Windows computers, you may notice a periodic "clicking" sound when the eCare session window refreshes. To disable this sound, open the Windows Control Panel. Then, open the sound-properties option for your operating system:

- On Windows XP, open the *Sounds and Audio Devices* properties.
- On Windows 2000 and Windows Me, open the *Sounds and Multimedia* properties.
- On Windows 98 Second Edition, open the *Sounds* properties.

Now, in the *Sound Events* area, find and select the "Complete Navigation" option and choose *(None)* from the *Name* drop-down list. Do the same for the "Start Navigation" option.

Your eCare administrator may also enable and disable audible alerts for the trouble-ticket queue and certain eCare events. (These alerts are not affected when you disable the refresh clicking.) See your eCare administrator if you have any questions about these alerts.

The Customer Experience

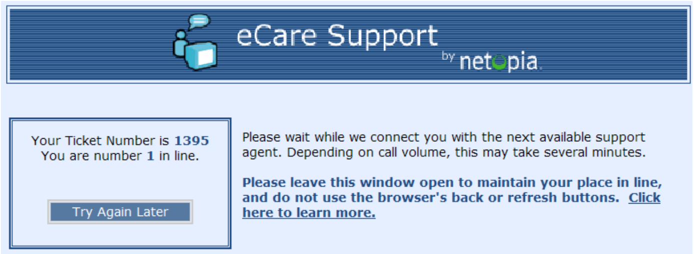
When your customer needs assistance, the first step is to fill out a trouble ticket. In most cases, the customer will fill out the trouble ticket. However, the Email Invite services allows you to enter a trouble ticket on the customer's behalf.

Submitting a Trouble Ticket

When customers need technical support or customer service, they will visit your organization's Web site and click a Web link to open the trouble-ticket form. (You may also email a link to the customer if, for example, you are already providing telephone support. The customer can click the link to enter the queue automatically. See "Sending an Email Invitation" on page 19.)

Note: The appearance of this window may vary depending on your eCare installation. Your eCare administrator may also configure it to display a special message to the customer, such as network status information or special offers.

When the customer fills in the requested information and clicks *Submit*, a trouble ticket is created in the eCare ticket queue. The eCare session window opens on the customer's desktop, asking them to wait for the next available Support Agent and showing their place in line. (The customer may also be asked to fill out a survey before joining the queue. See the following section, "Filling Out a Customer Survey.")



The customer must keep the eCare session window open to remain in the queue.

Filling Out a Customer Survey

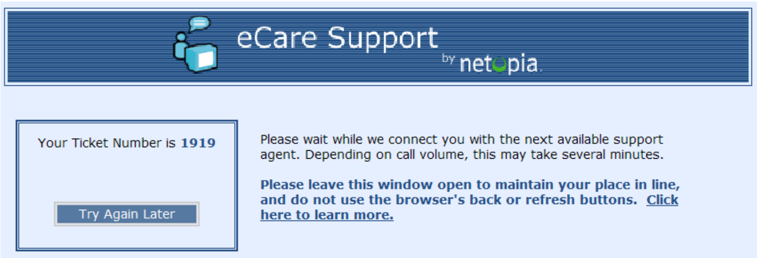
Your eCare administrator may configure your eCare service to present a survey after the customer fills out the ticket submission form or after you resolve their trouble ticket (or both). After the customer fills out the survey and clicks *Submit*, the eCare session window opens.

Responding to an Email Invitation

In some situations, such as when you are assisting a customer on the phone and need to begin an eCare session, it may be easier for you to fill out the trouble-ticket form on the customer's behalf. You can use the Email Invite service to open the trouble ticket and email it to the customer.

When you submit the email invitation, eCare sends an email message to the email address you specify in the invitation.

The email message contains a unique URL, which includes a preassigned trouble-ticket ID number. When the customer loads the URL in their Web browser, the trouble ticket is submitted to the queue automatically. The eCare session window is displayed, displaying the trouble-ticket number and asking the customer to wait for the next available Support Agent.



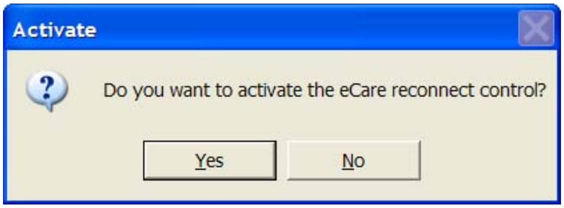
When the customer enters the ticket queue, you will select the ticket and proceed normally with the eCare session as described throughout this document.

Note: The customer can use the invitation URL only one time, after which it is no longer valid. In addition, the URL will expire after 50 minutes. (Your eCare administrator can change the default expiration period.) If the customer attempts to reuse the URL, or to use it after it expires, eCare will direct them to submit a new trouble ticket.

Reconnecting After Reboot

During an eCare session, you may make changes to the customer's computer that require the computer to reboot. If the customer is using Internet Explorer for Windows, you will be able to force the computer to reboot by using the Reboot Computer service, described in "Reboot Computer" on page 28.

When you send the reboot order, eCare displays the Activate dialog box on the customer's computer.



- If the customer clicks *Yes*, eCare executes the reboot.
- If the customer clicks *No*, the eCare session transcript will display a message that the request was denied. Be sure to explain what you are doing.

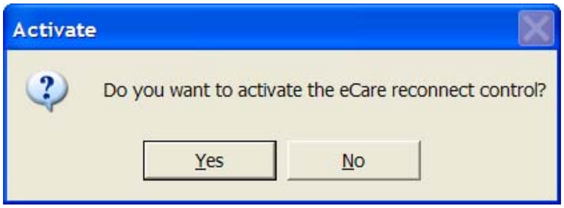
When the reboot is complete, the customer's Web browser will automatically open and load a unique eCare URL, which returns the customer to the trouble-ticket queue with the same ticket ID as before. The eCare session window is displayed, displaying the trouble-ticket number and asking the customer to wait for the next available Support Agent.

When the customer reenters the ticket queue, you will select the ticket and proceed normally with the eCare session as described throughout this document. The transcript area in the eCare session window will display the full session transcript, including the portion of the session that took place before the reboot.

Reconnecting After Session Interruption

During an eCare session, it may occur that your connection with the customer fails. (For example, the customer's network connection may be interrupted.) The eCare reconnect component allows eCare to retain the customer's trouble-ticket number and session history when the customer reconnects.

When you accept an eCare trouble ticket, and the eCare reconnect component is enabled on your eCare service, the Activate dialog box opens on the customer's screen, asking them to activate the reconnect component.



If the customer clicks *Yes*, eCare saves a unique URL as a shortcut on the customer's desktop. If the eCare session is interrupted, the customer can double-click the shortcut to return to the trouble-ticket queue with the same ticket ID as before. The eCare session window is displayed, displaying the trouble-ticket number and asking the customer to wait for the next available Support Agent.

When the customer reenters the ticket queue, you will select the ticket and proceed normally with the eCare session as described throughout this document. The transcript area in the eCare session window will display the full session transcript, including events that took place before the interruption.

Note: The customer can use the reconnection shortcut only one time, after which the URL is no longer valid. By default, the URL will expire after 50 minutes. Your eCare administrator can configure the expiration period.

Accessing the eCare Service

To access the eCare service, open your browser and go to the URL provided by Netopia or your eCare administrator. In most cases, this URL will be in the form

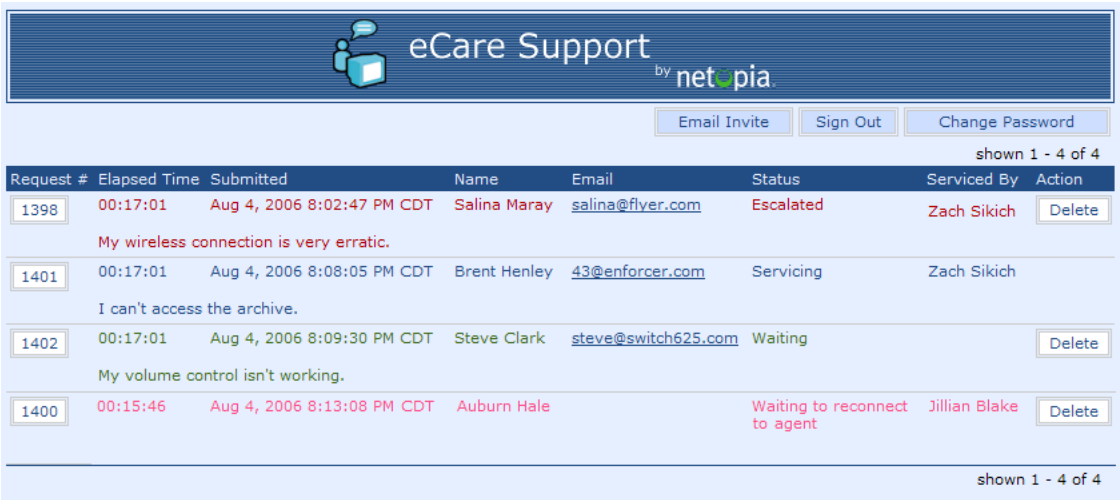
http://‹*ecare-server*›/‹*service-name*›/agent

Sign in to the eCare system with the user name and password you were assigned.

When you load the main eCare page for the first time, you may automatically be prompted to download and install the eCare ActiveX control or the eCare plugin. See the following section, "Downloading and Installing the eCare Remote-Control Component."

Note: Your administrator may have pre-installed the ActiveX control or plugin on your computer, or you may be prompted to download it at a different time. See your eCare administrator if you have any questions.

When you sign in to eCare, the main trouble-ticket queue appears.



Note: The eCare interface is highly customizable. Your eCare administrator may have set up your eCare service with an appearance that is dramatically different from the images that appear in this document. However, the controls and their names will remain very similar.

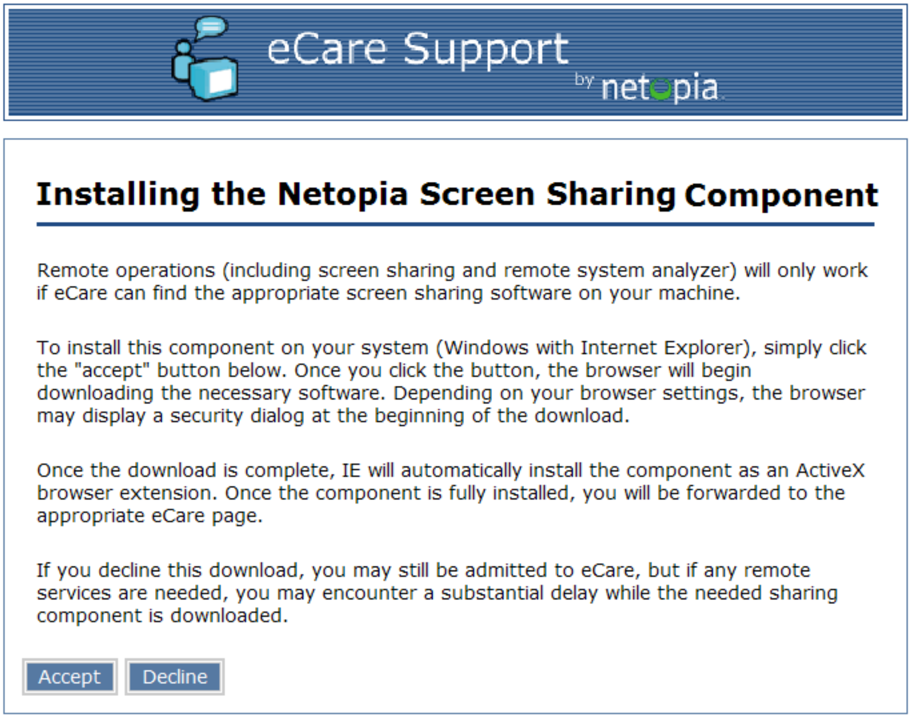
From this page you may select a customer to assist (see "Working with the Trouble-Ticket Queue" on page 17) or send an email invitation to a customer who has not entered a trouble ticket (see "Sending an Email Invitation" on page 19). You also have the option to change your eCare password. See "Changing Your Password" on page 20.

Downloading and Installing the eCare Remote-Control Component

Before you can use eCare's screen-sharing services—View Remote User, Control Remote User, Share My View, Share My Controls, and Examine System—you will need to install the *eCare remote-control component*, which is a control that enables your computer to use these services. Windows computers use the eCare ActiveX control, while Macintosh computers use the eCare plugin. The following sections discuss downloading and installing the eCare remote-control component on your computer.

The Windows eCare ActiveX Control

In most eCare installations, the first time you sign in to eCare using a Windows computer, you will receive a window asking you to download and install the eCare ActiveX control. (Your customers who access eCare using Windows computers will receive the same message. Macintosh users will be prompted to download the eCare plugin as described on page 15.)



Note: Depending on your company's eCare setup, your eCare administrator may have pre-installed the ActiveX control on your computer, or you may be prompted to download it at a different time. See your administrator if you have questions.

To install the ActiveX control, click the *Accept* button. Then click *Yes* in the Security Warning dialog box.

- On most operating systems, the ActiveX control will download and install automatically.
- On Windows XP computers, the Installing Browser Add-On window appears. Right-click the yellow ActiveX warning bar and select *Install ActiveX Control* to begin installing the eCare remote-control component. When a window appears, asking if you want to install the software, click the *Install* button.

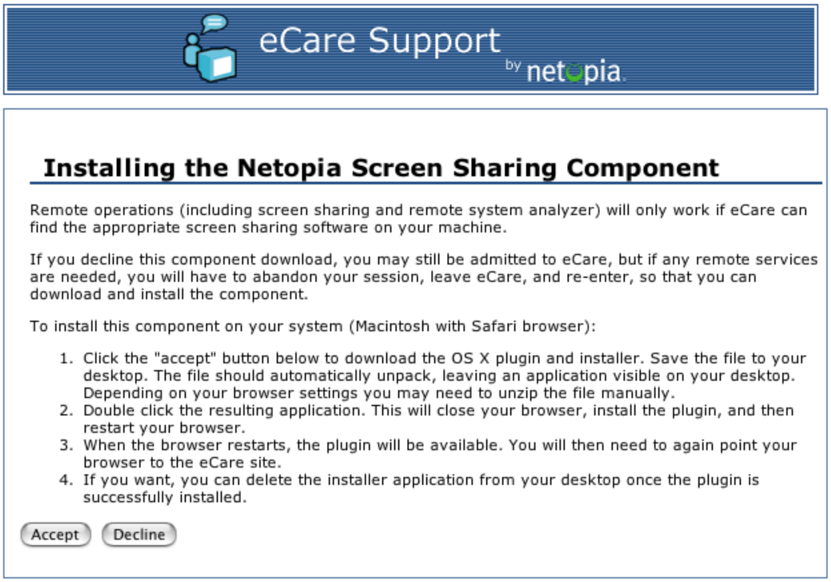
  Note: You will need to click the *Install* button twice to install both the eCare remote-control component and the eCare reconnect component.

The ActiveX control is named *CobAgent4 Class*. It is installed in the *WINNT/Downloaded Program Files* or *WINDOWS/Downloaded Program Files* folder. When the installation is complete, the trouble-ticket queue appears.

Note: Periodically, Netopia releases upgrades to the eCare system. If you open the eCare Web site and your system detects an upgraded ActiveX control, it will automatically prompt you to update to the new version.

The Macintosh eCare Plugin

In most eCare installations, the first time you access the eCare site using a Macintosh computer, you will receive a dialog box asking you to download and install the eCare plugin. (Your customers who access eCare using Macintosh computers will receive the same message. Windows users will be prompted to download the eCare ActiveX control as described on page 13.)



Note: Depending on your company's eCare setup, your administrator may have pre-installed the eCare plugin on your computer, or you may be prompted to download it at a different time. See your eCare administrator if you have any questions.

Click the link to download the eCare plugin. It will be downloaded as a disk image and opened automatically.

To install the browser plugin, double-click the *Netopia RC Installer* file. (Depending on your Mac OS X settings, it may run automatically.) A dialog box appears, indicating that the browser plugin will be installed. Click *Yes*.

Installation then proceeds automatically. When installation is complete, you will be notified. To complete the plugin installation, shut down and restart Safari. You *must* perform the restart to complete the plugin installation. Then return to the eCare URL and sign in.

Note: Periodically, Netopia releases upgrades to the eCare system. If you open the eCare Web site and your system detects an upgraded plugin, it will automatically prompt you to update to the new version.

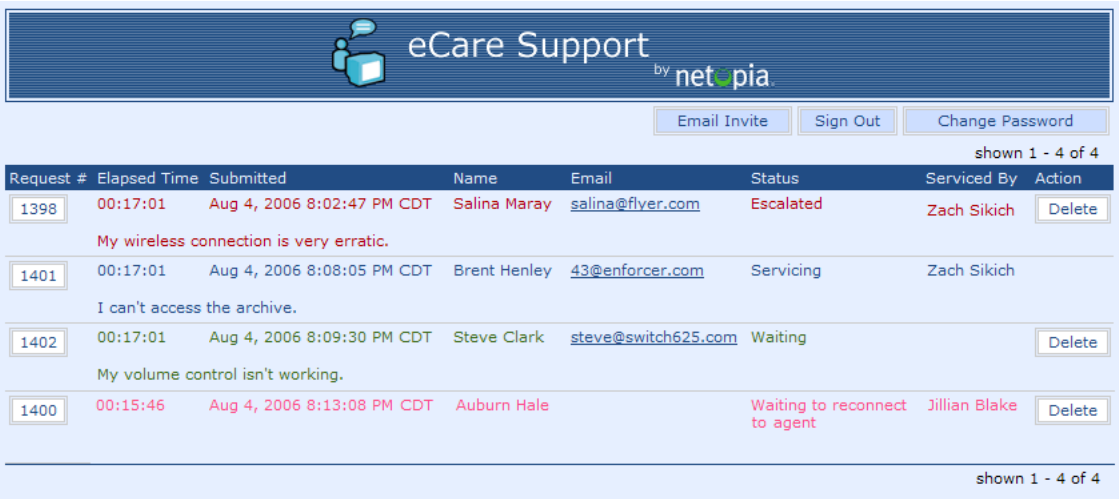
Email Notification

If your eCare system is set up with email notification, and your eCare administrator has specified your email address in the email-notification configuration, the eCare server will send you an email message every time a customer submits a new trouble ticket.

When you receive a notification email, open the trouble-ticket queue and select the customer's trouble ticket. (If the trouble ticket has already been selected by another eCare Support Agent, its status will indicate *Servicing*.)

Working with the Trouble-Ticket Queue

When you sign in to the eCare system, the eCare ticket queue appears.



In the above illustration, there are 4 requests in the queue. The first trouble ticket has been escalated, while the second is being helped by the Support Agent listed in the *Serviced By* column. The third customer is waiting for support, and the fourth customer has reconnected to eCare after a session interruption.

Each customer is listed in the queue with their contact information and a summary of the issue they need help with. Tickets are listed in the order that they were submitted.

If your eCare system is set up with email notification, and your email address is included in the notification list, you will receive an email message each time a new trouble ticket is created. (See "Email Notification" on page 16 for more information.) You do not need to be signed in to the eCare system to receive email notifications.

When you view the queue, you have several options. You may

- Click a trouble-ticket number in the *Request #* column to accept a request and begin helping a customer.

- Click a customer’s email address in the *Email* column to send the customer an email without opening the trouble ticket. A blank email message, addressed to the customer, will open in your default email client.
- Click the *Delete* button to remove the trouble ticket from the queue without opening the trouble ticket or assisting the customer. (The *Delete* button appears only if your Support Agent profile has been assigned this privilege.)

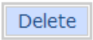
Accepting a Request in the Queue

To accept a request and begin helping a customer, click a trouble-ticket number in the *Request #* column. You may choose the first request in the queue whose status is *Waiting* or *Escalated*, review the ticket summaries for an issue that relates to your area of expertise, or select a specific customer to assist.

When you accept a request, an eCare session window opens in your browser and you are connected to the customer. Remember that *all* pop-up blocking software for your browser *must be turned off* before you can use eCare. See “Interacting with the Customer” on page 21.

Note: Your eCare administrator may configure your eCare service to present you with a survey before the eCare session window opens. (See “Responding to eCare Surveys” on page 35.) Fill out the survey and click *Submit* to send the survey and open the eCare session window.

Deleting a Request from the Queue



To delete a request from the queue, click the *Delete* button for that trouble ticket. Note that you cannot delete requests with a status of *Servicing*, as those customers are actively being helped by other Support Agents. (Remember that the *Delete* button appears only if your Support Agent profile has been assigned this privilege.)

Resolved requests are deleted from the queue automatically.

Sending an Email Invitation

In some situations, such as when you are assisting a customer on the phone and need to begin an eCare session, it may be easier for you to fill out the trouble-ticket form on the customer's behalf. You can use the Email Invite service to open the trouble ticket and email it to the customer.

You can fill out the trouble ticket as you speak to the customer or by copying their information from another customer-management application. When you submit the email invitation, eCare sends an email message to the email address you specify in the invitation.

The email message contains a unique URL, which includes a preassigned trouble-ticket ID number. When the customer loads the URL in their Web browser, the trouble ticket is submitted to the queue automatically.

To send an email invitation

1. In the trouble-ticket queue window, click the *Email Invite* button.

2. Enter the customer's information in the appropriate fields. Be sure to double-check the email address; if you enter the address incorrectly, the customer will not receive the invitation.
3. Click *Submit* to send the email message to the email address you specified.

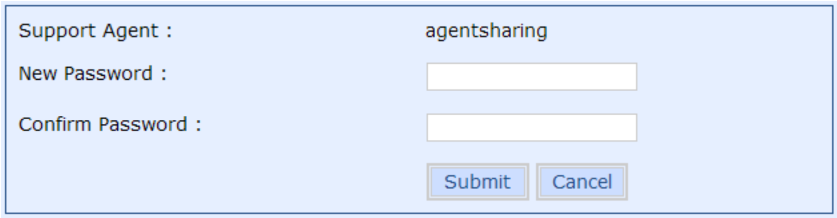
When the customer receives the email, loads the URL in their Web browser, and enters the trouble-ticket queue, you will select the ticket and proceed normally with the eCare session as described throughout this document.

Note: The customer can use the invitation URL only one time, after which it is no longer valid. By default, the URL will expire after 50 minutes. Your eCare administrator can configure the expiration period.

Changing Your Password

To change your eCare password, click the *Change Password* button above the trouble-ticket queue.

Note: If you do not know your user name and password, contact your organization's eCare administrator to change your password.



On the Change Password screen, enter your new password in the *New Password* and *Confirm Password* fields. Then click *Submit*. The password must be at least 5 characters in length (the maximum possible length is 200 characters), and it can contain any alphanumeric characters. You cannot save the new password until the *New Password* and *Confirm Password* boxes match exactly.

Interacting with the Customer

When you accept a request in the ticket queue, a new browser window—the *eCare session window*—opens on your desktop.

Note: Your eCare administrator may configure your eCare service to present you with a survey before the eCare session window opens. (See "Responding to eCare Surveys" on page 35.) Fill out the survey and click *Submit* to send the survey and open the eCare session window.

Your eCare session window includes the customer’s trouble-ticket information, a session transcript, a text-chat area, and several control buttons.

- To view the customer’s trouble-ticket information, click the disclosure circle next to the ticket number.
- If the customer reconnected to eCare after a reboot or a session interruption, the transcript from the previous session will appear in the transcript area.

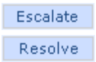
When you accept the trouble ticket and your eCare session window opens, the customer’s eCare window, which displayed their place in line, changes to an active session window.

The Control Buttons

At the top of the eCare session window are three control buttons: *Email Transcript*, *Escalate*, and *Resolve*.

- At any time during the eCare session, you may click the *Email Transcript* button. When the session is complete, a session transcript will be emailed to you. The customer’s eCare session window also includes the *Email Transcript* button. You may wish to inform the customer that they can request the transcript to save for future reference. Remind them that it will be sent when the session is complete; it will not be sent immediately.

  Note: The *Email Transcript* button appears in your eCare session window only if the eCare administrator entered your email address in your Support Agent profile. It appears in the customer’s eCare session window only if they entered their email address in the trouble ticket.



- You will use the *Escalate* and *Resolve* buttons to close the eCare session window when you are finished working with the customer (see “Ending a Support Session” on page 34).

The Service Tabs

At the bottom of the eCare session window are up to three service tabs: *URLs*, *Files*, and *Remote Tasks*. Each tab includes controls and service buttons that allow you to interact with the customer in different ways. However, in certain cases, some services or service tabs may not appear.

- The services you may use depend on your eCare installation and the privileges that have been assigned to your Support Agent account. For example, if you are using an account with “standard agent” privileges, all of the screen-sharing features are disabled. To use screen-sharing services, you must have "premium agent" privileges. Contact your eCare administrator if you believe your service privileges are incorrect.

- If the customer is using a browser that does not fully support eCare, or if they did not download the eCare remote-control component, the screen-sharing buttons may not appear. The Install Sharing control may appear instead.

See "eCare Services and the Service Tabs" on page 24 for information about service tabs and the service buttons they contain.

Chatting with the Customer

When you select a trouble ticket and begin an eCare session, the text-chat feature is available automatically. You will begin most of your eCare sessions by chatting with the customer to better understand the type of service that is needed. Enter text in the text-chat area and press ENTER or click *Send* to send the message to the customer. Or use the *Select a Shortcut Message* drop-down list, which displays a customized list of standard chat phrases you can select and send. See your eCare administrator for more information about this option.

Once you have discussed the problem with the customer, use the service tabs at the bottom of the session window to select and launch the service you need to assist the customer. Depending on your eCare installation, you may be able to

- Send a file to the customer's computer, or request a file from the customer. Use the *Files* service tab.
- Push a URL to the customer's browser, or load a Web page on your own computer that may help you assist the customer. Use the *URLs* service tab.
- View the remote desktop to determine where the customer needs help, or take control of the remote computer to guide the customer with hands-on help to resolve their problem. You can even reboot the remote computer and reconnect automatically. Use the *Remote Tasks* service tab.
- Allow "reverse remote control," which enables the customer to view or control your computer. Use the *Remote Tasks* service tab.
- Use the Examine System service to generate a "snapshot" of the hardware and software on the remote computer. Use the *Remote Tasks* service tab.
- Reboot the remote computer, which may be required after you change settings or install software on the computer. Use the *Remote Tasks* service tab.
- Install the eCare remote-control component on the remote computer. Use the *Remote Tasks* service tab.

Remember that the actions you may perform depend on your eCare installation and the service privileges that have been assigned to your Support Agent profile.

See the following section, "eCare Services and the Service Tabs," for more information on each service.

Each time you launch a service or connection with the remote computer, a record of the action you took appears in the transcript panel at the top of your eCare session window. The transcript also appears in the customer's session window.

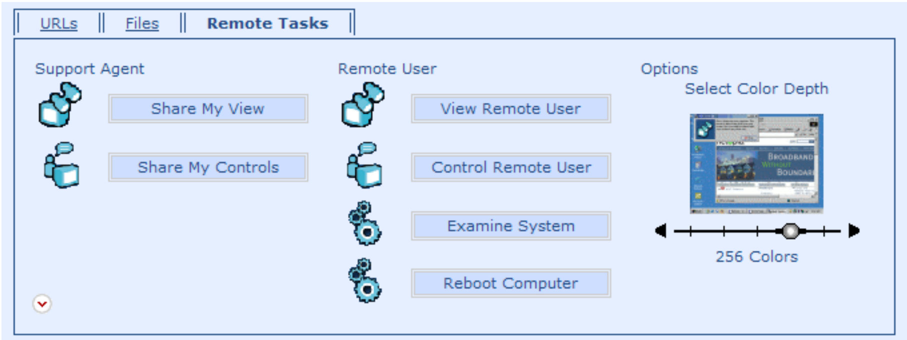
eCare Services and the Service Tabs

When chatting with the customer isn't enough to resolve their problem, you can use additional eCare services to assist them further. These services are available from up to three *service tabs* that may appear at the bottom of your eCare session window. Each tab may include both *Support Agent* and *Remote User* controls.

- With the *Remote Tasks* tab, you may directly view or control the customer's computer or allow the customer to control or view your computer. See the following section.
- With the *URLs* tab, you may push a URL to the customer's browser, or load a Web page on your own computer that may help you assist the customer. See "The URLs Tab" on page 30.
- With the *Files* tab, you may send a file to the customer's computer, or request a file from the customer. See "The Files Tab" on page 32.

The Remote Tasks Tab

With the *Remote Tasks* tab, you may directly view or control the customer's computer or allow the customer to control or view your computer. You may also generate a "snapshot" of the remote computer and its settings, allowing you to access information that may assist you in solving the customer's problem. The services you may use are discussed in the following sections.



Note: If the customer has not yet installed the eCare remote-control component, the *Remote Tasks* tab will display only the *Install Sharing* control (it may also display the *Reboot Computer* control). See "Install Sharing" on page 30.

Depending on your eCare installation, the first time you launch one of the services on the *Remote Tasks* tab, both you and the customer may be prompted to download and install the eCare remote-control component. Be sure to use the text-chat window to let the customer know what to expect. See "Downloading and Installing the eCare Remote-Control Component" on page 13 for details.

Note: The *Remote Tasks* tab will not appear if your eCare installation does not support it, and its controls will be disabled if screen-sharing privileges are not granted to your Support Agent account. However, if you expect the *Remote Tasks* tab to appear, and it is missing or empty, make sure that both you and your customer are using a supported Web browser. (See "System Requirements" on page 5 for a list of supported browsers and their associated settings.) If your customer is not using a supported browser, you may still be able to use the text-chat feature. If you need to use the remote-control services, inform the customer and ask them to return to eCare with a supported browser.

Share My View

The Share My View service allows a customer to view your desktop while you maintain control over your machine. With Share My View, your customer can watch you work as you demonstrate procedures or point out problem areas. Share My View allows customers to watch your system but assures you that they cannot make any changes to your computer.

Click the *Share My View* button to allow the customer to view your desktop. The Ask for Permission dialog box will appear on your screen, prompting you to allow or deny the connection. (See "Approving Screen-Sharing Sessions" on page 27 for details.) Meanwhile, the Waiting for Permission dialog box appears on the customer's computer, indicating that the connection is being established. Click *Allow* to complete the connection.

You can end the session at any time by clicking *Stop* in the Host Controls window, which appears when the screen-sharing session is established.

Share My Controls

The Share My Controls service is similar to Share My View, but the customer will have direct control of your machine. You can use the Share My Controls service to display your desktop on the remote computer and allow the customer to control your computer for instructional or training purposes. However, eCare leaves the ultimate control in your hands. You always have first-priority control over the mouse and keyboard, so you can override any mouse or keyboard actions the customer takes.

Click the *Share My Controls* button to allow the customer to take control of your computer and use their mouse and keyboard to remotely control your system. The Ask for Permission dialog box will appear on your screen, prompting you to allow or deny the connection. (See "Approving Screen-Sharing Sessions" on page 27 for details.) Meanwhile, the Waiting for Permission dialog box appears on the customer's computer, indicating that the connection is being established. Click *Allow* to complete the connection.

You can end the session at any time by clicking *Stop* in the Host Controls window, which appears when the screen-sharing session is established.

View Remote User

The View Remote User service allows you to view the remote computer's desktop while the customer maintains control over the machine. With View Remote User, you can watch the customer replicate the problem for you. You can see where the customer is having trouble and use the text-chat window, or one of the other services, to solve the problem. View Remote User allows you to watch the remote computer but assures the customer that you cannot make any changes to their computer.

Click the *View Remote User* button to start the screen-sharing service. The Ask for Permission dialog box will appear on the customer's screen, prompting them to allow or deny the connection. (See "Approving Screen-Sharing Sessions" on page 27 for details.) Use the text-chat window to let the customer know what to expect. The customer must click *Allow* to complete the connection.

The customer can end the session at any time by clicking *Stop* in the Host Controls window, which appears when the screen-sharing session is established.

Control Remote User

The Control Remote User service is similar to View Remote User, but you, as the Support Agent, will have direct control of the remote computer. Often this is the quickest and most efficient way to change settings, install software, and configure a remote system. However, you can reassure the customer that eCare leaves the ultimate control in their hands. The customer always has first-priority control over their mouse and keyboard, so they can override any mouse or keyboard actions you take. They can even shut down the remote control session altogether.

Click the *Control Remote User* button to take control of the remote computer and use your mouse and keyboard to remotely control the system. The Ask for Permission dialog box will appear on the customer's screen, prompting them to allow or deny the connection. (See "Approving Screen-Sharing Sessions" on page 27 for details.) Use the text-chat window to let the customer know what to expect. The customer must click *Allow* to complete the connection.

The customer can end the session at any time by clicking *Stop* in the Host Controls window, which appears when the screen-sharing session is established.

Approving Screen-Sharing Sessions

Before you can use the View Remote User or Control Remote User service on the remote computer, the customer must approve it. Similarly, when you use the Share My View or Share My Controls service to ask a customer to view your computer, you will need to grant permission before the connection can be completed.

When you click the *View Remote User* or *Control Remote User* button, the Ask for Permission dialog box appears on the customer's screen, requesting permission to perform the action you requested. When an incoming connection to your computer begins with the Share My View or Share My Controls service, the same Ask for Permission dialog box appears on your screen. If permission is denied, the connection will not be completed.

When you launch any screen-sharing session, use the text-chat window to explain to the customer what is happening.

Examine System

Click the *Examine System* button to launch the Examine System service.

The Examine System service gathers information about the remote computer that may assist you in solving the customer's problem. With one click, you can retrieve targeted information on the operating environment of the remote computer. For example, the utility retrieves the remote computer's hardware profile and a list of installed software, which may enable you to resolve conflicts or determine the likely cause of errors. In addition, you'll receive a complete list of the processes running on the remote computer and a summary of the proxy and security settings in the customer's Web browser. Erroneous settings are a common cause of connection failures.

When you click the *Examine System* button, an Ask for Permission dialog box appears on the customer's screen, requesting permission to examine the computer. The customer must click *Allow* to enable the session to proceed.

Once the examination is complete, a new browser window opens and displays the System Information window with the Examine System report. (This process may take a few moments.) For detailed information about the Examine System report, see "Appendix: Using the Examine System Service" on page 37.

When you are finished with the Examine System report, close the System Information window by clicking the close button in the upper-right corner of the window. Or, when you resolve or escalate the trouble ticket, the window will close automatically.

If your eCare Administrator has configured eCare to automatically save data from the Examine System report, the raw XML on which the report is based is archived for audit and diagnostic purposes. To view the data (which will be displayed in raw XML format, without special processing), click the link in the session transcript line "The system analysis data can be seen by clicking here." The customer may also use this link to view their computer's data.

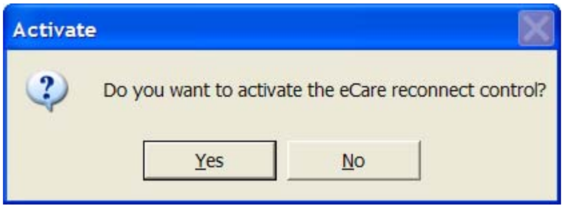
If you need to reopen the report in its original format, however—or if eCare is not configured to save reports and you need to review the report data—you must use the Examine System service again.

Reboot Computer

If you have made changes to the customer's computer that require the computer to reboot, use the Reboot Computer service. Before you reboot the remote computer, be sure to explain to the customer what to expect.

Note: The Reboot Computer service is supported only if the customer's computer is running Windows 2000 or Windows XP. It is not supported on Macintosh computers.

1. In the eCare session window, on the *Remote Tasks* tab, click *Reboot Computer*.
2. On the customer's computer, the Activate dialog box appears.



- If the customer clicks *Yes*, eCare writes a unique key to the customer's Windows registry and executes the reboot.
- If the customer clicks *No*, the eCare session transcript will display a message that the request was denied. Be sure to explain to the customer what you are doing.

When the reboot is complete, the Windows registry key causes the customer's Web browser to open automatically and load a unique eCare URL, which returns the customer to the trouble-ticket queue with the same ticket ID as before.

When the customer first returns to the queue, the ticket status is shown in the ticket queue as *Waiting to Reconnect to Agent*, and the ticket is highlighted in your queue. (It is not highlighted for the other Support Agents in your organization. However, any Support Agent may select the ticket.) After a certain period of time, the highlighting is removed and the status changes to *Waiting to Reconnect*.

3. When you accept the ticket, the screen-sharing window reopens. The full transcript from the previous session will appear. (The transcript is maintained even if another Support Agent accepts the trouble ticket, or if you assist a reconnected customer who was previously assisted by another Support Agent.)
4. Complete the eCare session and resolve it normally.

Select Color Depth

The Select Color Depth control allows you to specify the color depth of a screen-sharing session. Before you launch a screen-sharing session, you may wish to change the color depth by clicking the slider at the bottom of the Select Color Depth control. Fewer colors allow for faster screen-sharing.

The Select Color Depth control affects screen-sharing sessions in both directions: when you view the customer's computer and when the customer views your computer.

Note: You must set the color depth before you start a screen-sharing session. You cannot change the color depth of an active session.

Install Sharing

If the customer has not yet installed the eCare remote-control component when you begin the eCare session, the *Remote Tasks* tab will display only the *Install Sharing* and *Reboot Computer* controls. If you wish to use the screen-sharing services, you must use the *Install Sharing* control to allow the customer to install the eCare remote-control component.

First, use the chat window to explain to the customer what to expect. Then click the *Install Sharing* button.

An alert window will appear on the customer's computer, indicating that their Support Agent would like to install the eCare remote-control component. The customer must click *Allow Request* to proceed. The customer will then receive a window asking them to download and install the eCare ActiveX control. (This is the same window that appeared when you installed the eCare ActiveX control. See "The Windows eCare ActiveX Control" on page 13.) The customer must click *Accept* to accept the download, and then click *Yes* in the Security Warning dialog box.

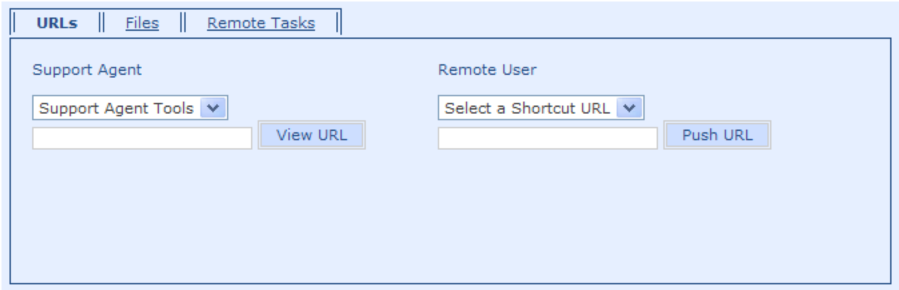
- On most operating systems, the ActiveX control will download and install automatically.
- On Windows XP computers, the Installing Browser Add-On window appears. Tell the customer to right-click the yellow ActiveX warning bar and select *Install ActiveX Control* to begin installing the eCare remote-control component. When a window appears, asking if the customer wants to install the software, they must click the *Install* button.

When installation is complete, the full set of screen-sharing controls will appear on the Remote Tasks tab.

The URLs Tab

With the *URLs* tab, you may push a URL to the customer's browser, or load a Web page on your own computer that may help you assist the customer.

Note: Depending on your eCare installation, the available options may vary.



View URL (Support Agent Tools)

Use the *Support Agent Tools* drop-down list to select a URL to load in a new window on your computer. The list may include links to internal or external Web sites that contain information you can use to assist the customer. Your eCare administrator can provide information about the URLs you may load.

To use the View URL service, select a URL from the *Support Agent Tools* drop-down list or enter a URL in the text box. Then click the *View URL* button. A new browser window opens on your computer with the specified URL loaded automatically.

Push URL

The Push URL service allows you to push a a Web address to the customer's computer. The Web page that you specify opens automatically in a new browser window on the remote computer.

Depending on the type of difficulty the customer is having, you may wish to send URLs for technical support pages, links to download new or updated software, or sales information. Your eCare administrator can provide information about the URLs you may load.

To use the Push URL service, select a URL from the *Select a Shortcut URL* drop-down list or enter a URL in the text box. Then click the *Push URL* button. A new browser window opens on the remote computer with the specified URL loaded automatically. (Be sure to advise the customer that the new window may open *behind* the eCare session window.)

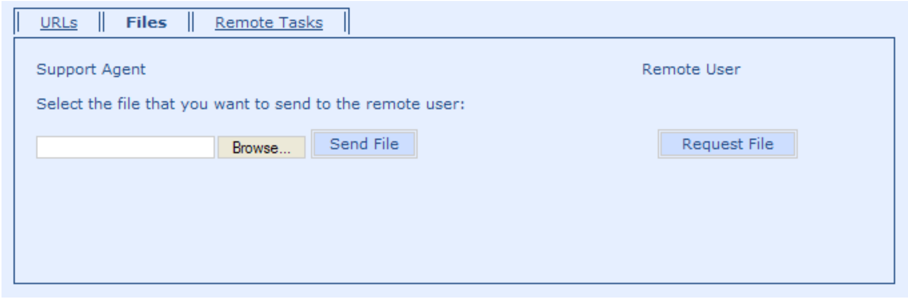
Note: If the window fails to open, which may occur if the customer is using a pop-up blocker, the customer may click the link that appears in the session transcript.

You may wish to advise the user to bookmark the page for future reference.

The Files Tab

With the *Files* tab, you may send a file to the customer's computer, or request a file from the customer.

Note: Depending on your eCare installation, the available options may vary.



Send File

With the Send File service, you can upload a file from your computer to the eCare server, allowing the customer to download the file. Send File is another option you can use to send customers the latest version of your software or documentation, updated product information, or confidential files that you cannot post to your Web site.

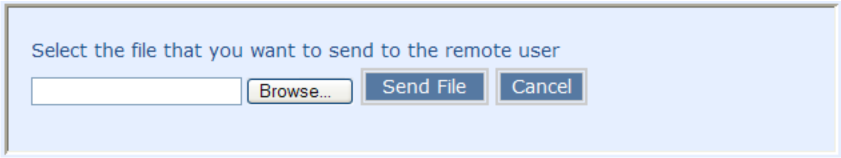
Click the *Browse* button and locate the file you wish to send. Then click *Send File*.

The file is uploaded to the eCare server, and a window appears on the remote computer, allowing the customer to save the file to the local computer. Be sure to tell the customer to click the *Save* button, rather than the *Open* button.

The maximum file size permitted by the Send File service is set when your eCare configuration is created. Your administrator will tell you what the file-size limit is in your eCare installation.

Request File

Click the *Request File* button to allow the customer to upload a file to the eCare server. A new section appears in the customer's eCare session window, allowing the customer to browse to the file and upload it.



The file is uploaded to the eCare server, and a window appears on your computer, allowing you to save the file to your computer. Be sure to click the *Save* button, rather than the *Open* button.

The maximum file size permitted by the Request File service is set when your eCare configuration is created. Your administrator will tell you what the file-size limit is in your eCare installation.

Reestablishing an Interrupted Session

During an eCare session, it may occur that your connection with the customer fails. (For example, the customer's network connection may be interrupted.) The eCare reconnect component allows eCare to retain the customer's trouble-ticket number and session history when the customer reconnects.

When you accept an eCare trouble ticket, and the eCare reconnect component is enabled on your eCare service, the Activate dialog box opens on the customer's screen, asking them to activate the reconnect component. If the customer clicks *Yes*, eCare saves a unique URL as a shortcut on the customer's desktop. If the eCare session is interrupted, the customer can double-click the shortcut to return to the trouble-ticket queue with the same ticket ID as before.

If you are working with a customer and the session is interrupted, the session transcript will display the message "Lost network connection to *customer name*." If the customer stops responding and you see this message, close the eCare session window and return to the ticket queue. Depending on your organization's policies, you may begin to assist another customer or wait to see if your customer will reconnect.

If the customer is able to reconnect, the trouble ticket will appear in the queue with the same ticket ID as before and the status *Waiting to Reconnect to Agent*. In addition, the ticket is highlighted in your queue. (It is not highlighted for the other Support Agents in your organization. However, any Support Agent may select the ticket.) After a certain period of time, the highlighting is removed and the status changes to *Waiting to Reconnect*. (Your eCare administrator will configure this timeout period when installing eCare.)

When you accept the trouble ticket, the screen-sharing window reopens. Proceed normally with the eCare session. The transcript area in the eCare session window will display the full session transcript, including the portion of the session that took place before the interruption.

Note: The customer can use the reconnection shortcut only one time, after which the URL is no longer valid. By default, the URL will expire after 50 minutes. Your eCare administrator can configure the expiration period.

Ending a Support Session

When you help a customer, you have two options for ending your eCare session with that customer—you may resolve the trouble ticket or escalate it.

It is important that you end your eCare session by resolving or escalating it, rather than closing your eCare session window. If you close the eCare session window without clicking *Resolve* or *Escalate*, eCare will assume that your Internet connection failed and that your customer still needs assistance. The customer's trouble ticket will be returned to the queue with a status of *Escalated*.

Note: Your eCare administrator may configure your eCare service to display a survey when you resolve or escalate the trouble ticket. (See "Responding to eCare Surveys" on page 35.) Fill out the survey and click *Submit* to send the survey and return to the trouble-ticket queue.

Resolving the Trouble Ticket

Once you have solved the customer's problem and answered any remaining questions they may have, click the *Resolve* button at the top of your eCare session window. Resolved trouble tickets are deleted from the queue. You are returned automatically to the queue to accept another help request.

Escalating the Trouble Ticket

If you are unable to resolve the support issue for any reason, click the *Escalate* button to return the customer to the trouble-ticket queue. The escalated trouble ticket is highlighted in red and its status is changed to *Escalated*. You may wish to escalate a ticket if a customer is having trouble outside or beyond your area of expertise.

Note: If your Internet connection fails while you are assisting a customer, eCare will detect that your eCare session terminated unexpectedly and the trouble ticket will be escalated automatically. Make sure to end each eCare session by clicking *Resolve* or *Escalate*.

Responding to eCare Surveys

Your eCare administrator may configure your eCare service to display a survey when one or more events occur while you are signed in to eCare:

- When you accept a trouble ticket
- When you resolve a trouble ticket
- When you sign out of eCare

Your customers may also be presented with surveys after they fill out the ticket submission form or after you resolve their trouble ticket.

Surveys are used to gather information about your customers and your eCare experience. They will help your administrator customize both eCare and your organization's other customer-support methods, such as documentation, training, and call centers.

When you encounter a survey, fill it out thoroughly. Then click *Submit* to send the survey and return to the trouble-ticket queue or finish signing out of eCare.

Troubleshooting

If you are having trouble using eCare, review the following issues for a resolution.

- You must have administrator privileges on your computer to install the eCare remote-control component. If you do not have administrator privileges, your eCare administrator will install the eCare remote-control component for you.
- The customer also must have administrator privileges to install the eCare remote-control component, as well as the eCare reconnect component. If the customer does not have administrator privileges, you will be able to chat with the customer, but you will not be able to use screen-sharing services.

- If you attempt to accept a trouble ticket, but the eCare session window does not open, make sure that *all* pop-up blocking software for your browser is turned off. This includes the pop-up blockers that are built in to Internet Explorer and Safari, as well as third-party blocking software for all platforms.
- When you open an eCare session with a remote computer, the actions you may perform depend on the service privileges that have been assigned to your Support Agent account. For example, if you are using an account with “standard agent” privileges, all of the screen-sharing features are disabled. To use screen-sharing services, you must have “premium agent” privileges. Contact your eCare administrator if you believe your service privileges are incorrect.
- If the *Remote Tasks* tab in the eCare session window is missing or empty, make sure that both you and your customer are using a supported Web browser. See “System Requirements” on page 5 for a list of supported browsers and their associated settings.
- If you are using Safari and you are repeatedly prompted to install the eCare plugin, restart Safari. You must perform the restart to complete the plugin installation.

Appendix: Using the Examine System Service

The Examine System service gathers targeted information on the operating environment of the remote computer, which may assist you in solving the remote user's problem. For example, the service retrieves the remote computer's operating system and a list of installed software, which may enable you to resolve conflicts or determine the likely cause of errors. In addition, you'll receive a complete list of the processes running on the remote computer and a summary of Internet Explorer's proxy and security settings. Erroneous settings are a common cause of connection failures.

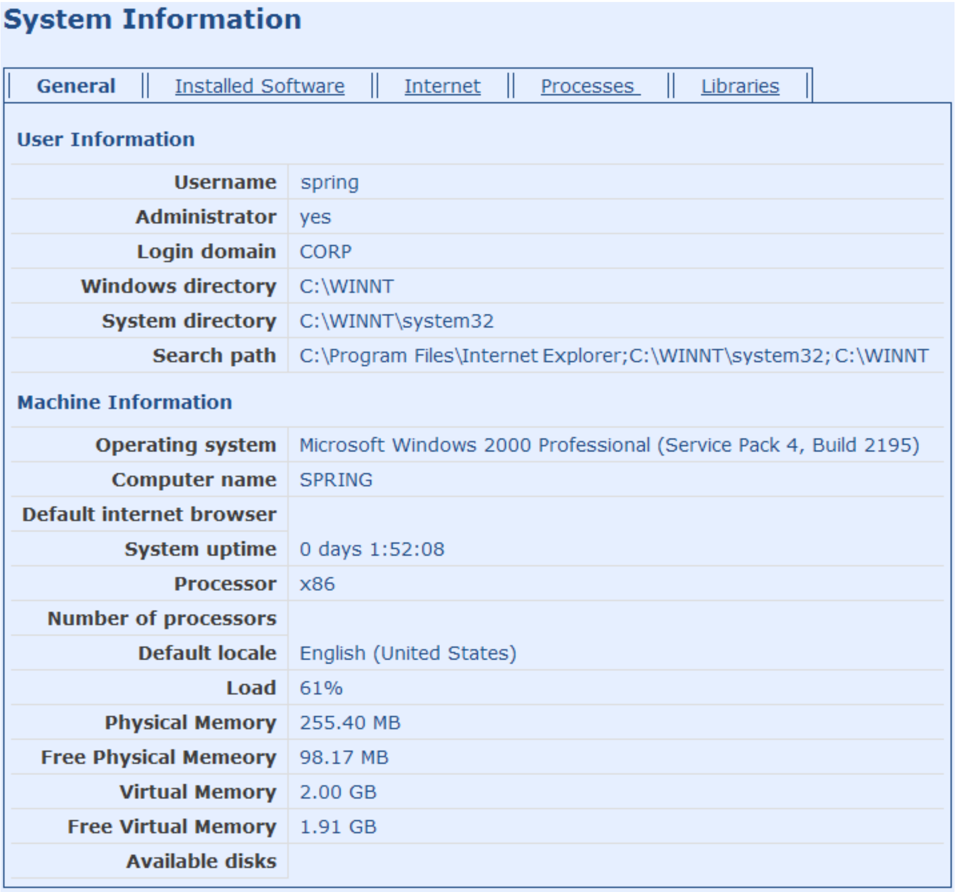
Note: This appendix covers the Examine System report only for Windows computers.

Generating the Examine System Report

When you open the trouble ticket to begin assisting the remote user, the *Examine System* button is displayed on the *Remote Tasks* tab. Click the *Examine System* button to launch the Examine System service.

When you click the *Examine System* button, an Ask for Permission dialog box appears on the customer's screen, requesting permission to examine the computer. The customer must click *Allow* to enable the session to proceed.

Once the examination is complete, a new browser window opens and displays the System Information window with the Examine System report. (This process may take a few moments.)



The System Information window displays information in five categories:

- *General*, which summarizes basic information about the user, operating system, and hardware of the remote computer. See page 39.
- *Installed Software*, which provides a complete list of the registered software installed on the remote computer. See page 39.
- *Internet*, which provides a summary of the Internet Explorer setup on the remote computer. See page 40.
- *Processes*, which provides a complete list of the processes running on the remote computer. See page 40.
- *Libraries*, which provides a complete list of the libraries (DLL files) on the remote computer and the specific version of each library. See page 41.

Using the System Information Window

The System Information window displays the Examine System report.

General Information

The *General* tab summarizes basic information about the user, operating system, and hardware of the remote computer.

User Information

The *User Information* section summarizes the login status and Windows directory information for the remote computer.

The *Administrator* value may be particularly valuable if the remote user is having trouble installing software—if the user is not logged in as an Administrator, software installations may not proceed successfully.

Machine Information

The *Machine Information* section summarizes the operating system and hardware profile for the remote computer. Information includes the operating system, processor, and available memory on the remote computer.

The processor and available memory values may be particularly valuable if the remote user is having difficulty with computer performance. Performance may be degraded if these values are low.

Installed Software Information

The *Installed Software* tab provides a complete list of the registered software installed on the remote computer. Select an application in the list to view its details at the bottom of the window.

Note: The Examine System service gathers this information from the Windows Registry. If the remote computer is running software that does not register itself in the Windows Registry, it will not appear in the Software Information profile.

The *Installed Software* tab allows you to view all the applications installed on a customer's computer, enabling you to diagnose possible conflicts or absent software.

Internet Information

The *Internet* tab provides a summary of the Internet Explorer setup on the remote computer. This category may help you determine whether any of the computer's Internet Explorer security or proxy settings are conflicting with the eCare service or other applications.

Processes Information

The *Processes* tab provides a complete list of the processes running on the remote computer. This category allows you to identify all the tasks currently running on the remote computer, such as applications and background processes. Use this information to identify any problem or areas of incompatibility, or to determine whether an application component is missing.

Running Processes

The *Running Processes* section provides a complete list of the processes running on the remote computer. Select a process to display its details in the *Details for Process* and *Loaded Libraries* sections.

Details For [Process]

The *Details for [Process]* section displays detailed information about the selected process.

Loaded Libraries

The *Loaded Libraries* section displays information about the DLL libraries associated with the selected process. This section appears only if the selected process has associated libraries.

Libraries Information

The *Libraries* tab provides a complete list of the libraries (DLL files) on the remote computer and the specific version of each library. Use this information to identify any problem or areas of incompatibility that may occur if the remote computer is using the wrong version of a library file.

Closing the System Information Window

When you are finished with the Examine System report, close the System Information window by clicking the close button in the upper-right corner of the window. Or, when you resolve or escalate the trouble ticket, the window will close automatically.

If your eCare Administrator has configured eCare to automatically save data from the Examine System report, the raw XML on which the report is based is archived for audit and diagnostic purposes. To view the data (which will be displayed in raw XML format, without special processing), click the link in the session transcript line "The system analysis data can be seen by clicking here." The customer may also use this link to view their computer's data.

If you need to reopen the report in its original format, however—or if eCare is not configured to save reports and you need to review the report data—you must use the Examine System service again.