

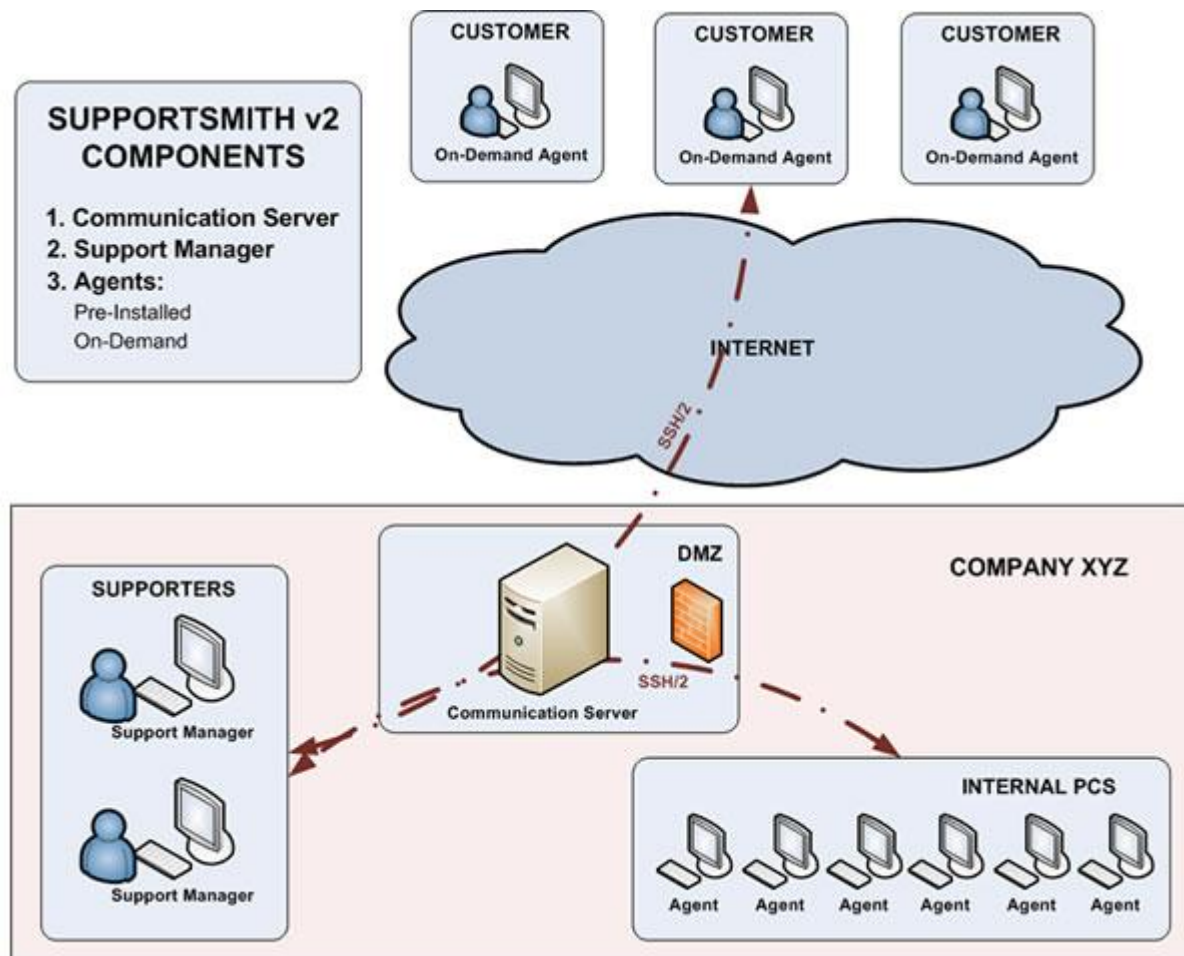
SupportSmith v2.0

Quick Setup Guide
2009

© 2009 All Rights Reserved. This manual and the software described are copyrighted. You should not reproduce, transmit, transcribe or translate this manual into any language or computer language, in any form or by any means without express written permission.

1 Quick Setup Guide

SupportSmith 2.0 is an integrated platform that provides Remote Assistance and Remote Access. It works by connecting supporters and agents through a server that handles their communication.



If this is the first time you run SupportSmith v2.0, we suggest you follow this step by step guide:

1. Register to get a trial License key
2. Install and Configure the SupportSmith Server
3. Install and Configure an Agent
4. Install Support Tools
5. Try the first Support Session
6. Install On-Demand Agent Creator

In the download package you have downloaded from

<http://www.cybelesoft.com/downloads/SupportSmithv2.zip>

you will find all the necessary files to perform the installation:



1.1 Register to get a trial License Key

In order to evaluate SupportSmith v2.0 you will need a trial License Key. Use the shortcut provided in the download package, or click here:

<http://www.supportsmith.com/Free-Trial/Register.aspx>

You will be asked to provide some basic information:



The registration form consists of the following fields and controls:

- First Name * (text input)
- Last Name * (text input)
- Position (text input)
- Company * (text input)
- Organization Unit (text input)
- Website (text input)
- Industry (dropdown menu with "[Select]" and a downward arrow)
- Address (text input)
- City (text input)
- Province / State (text input)
- Zip Code (text input)
- Country * (dropdown menu with "[Select]" and a downward arrow)
- E-Mail * (text input)
- Phone * (text input)
- Fax (text input)
- How did you find us? (dropdown menu with "[Select]" and a downward arrow)

Below the form, there is a message: "Check your e-mail address before sending the form. After a few minutes you will receive an automatic e-mail with the trial license." and a "Send" button.

Just make sure you complete the fields marked with *, and then hit the 'Send' button. You will receive an e-mail in the address provided, and attached you will see two files, which you need to download to your computer in order to use them during the installation.

1.2 Install and Configure the SupportSmith Server

Now that you have the download package and the trial License Key files, you are ready to begin the installation.

The SupportSmith Server is the module installed in the server machine, which is responsible for handling the communication between the supporters and the agents. This installer will set up a windows service that runs automatically, and will install the SupportSmith Server Manager.

Run SupportSmith v2 Server.msi setup in the server and proceed with the installation. At finish, start the SupportSmith Server Manager from the Start/Programs menu. The SupportSmith Server Manager is a tool for configuring all the key aspects involved with agent-supporter communication.

1. Enter the public host address and port:

This is the internet IP or DNS name of your server. Complete the 'Bind to IP' and 'Host' fields, as well as the 'Port' fields. Agents and Supporters will need this information in order to connect.

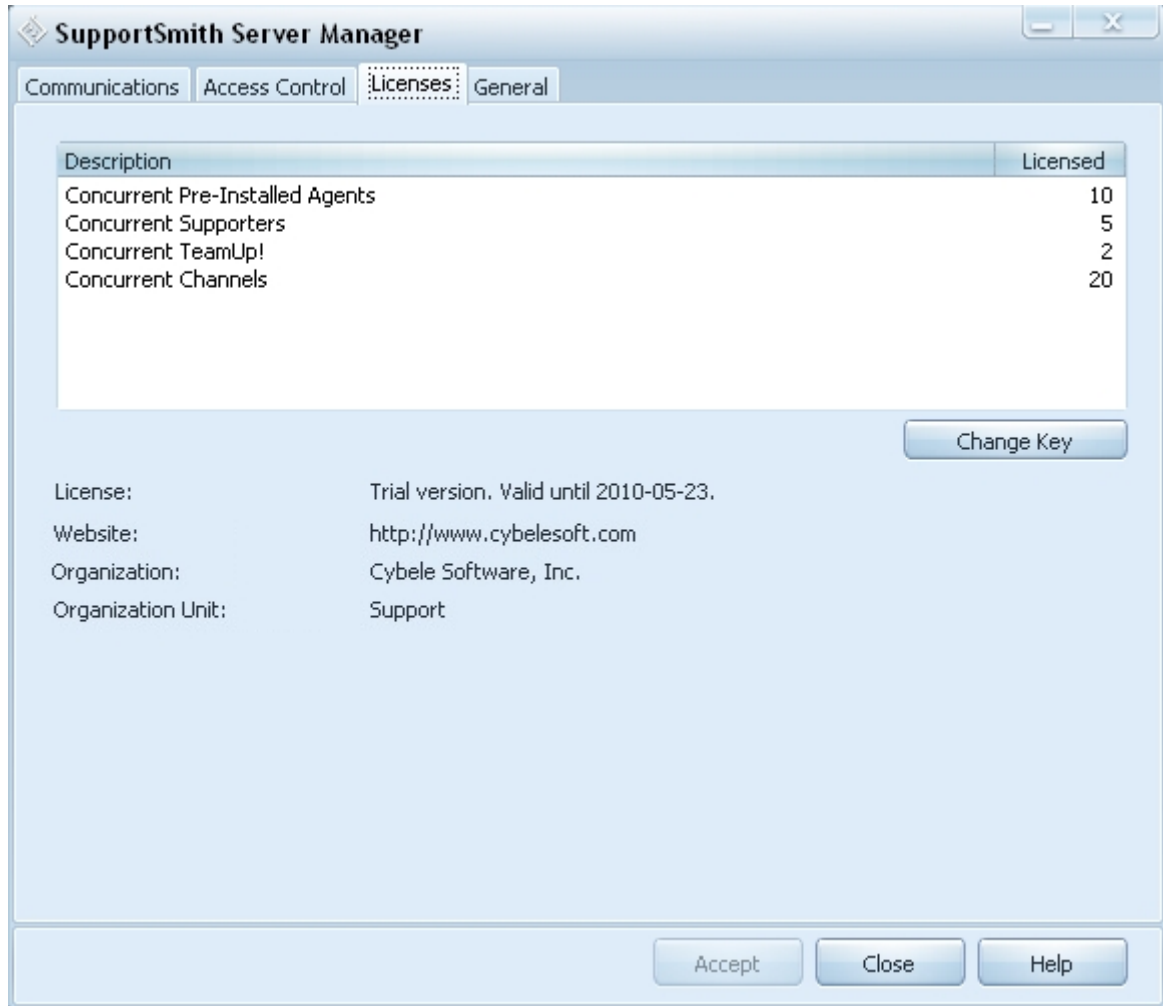
The screenshot shows the 'SupportSmith Server Manager' application window with the 'Communications' tab selected. The window has a title bar with standard Windows controls. Below the title bar are four tabs: 'Communications', 'Access Control', 'Licenses', and 'General'. The 'Communications' tab contains the following sections:

- Communication Parameters:** A group box containing a 'Bind to IP:' dropdown menu set to '(All unassigned)' and a 'Port:' text box containing '22'.
- Public Host Address:** A group box containing a 'Host:' text box and a 'Port:' text box containing '22'.
- Multi-Server Environment:** A checkbox labeled 'Multi-Server Environment:' which is checked.
- Broker List:** A group box containing a 'Host & Port:' label and a large empty text area for listing brokers. Below this area are two buttons: 'Add Server' and 'Remove Server'.

At the bottom of the window are three buttons: 'Accept', 'Cancel', and 'Help'.

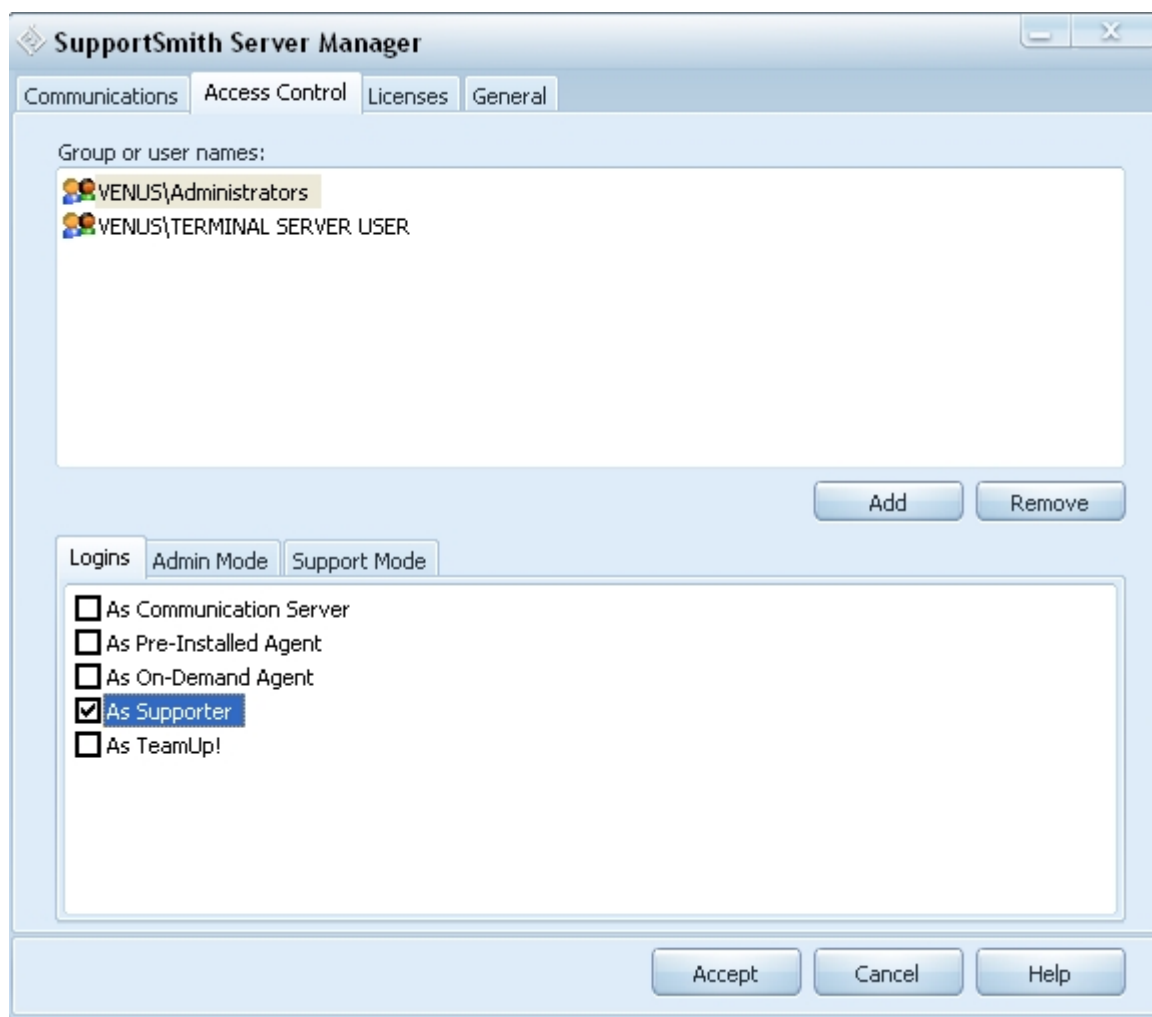
2. Add the License File.

Use the 'Change Key' button to load the .xml License file we sent you, (whether it is a trial or a registered license) and save the changes. You will see your license information displayed.



3. Set the access permissions.

Click on Edit to add your domain users/groups with access rights. Then select them and determine the Login mode for each one.



Make sure to have at least one user/group checked as Supporter, and one checked as Pre-Installed Agent.

Users who will be able to login as pre-installed agents will present the 'Agent features' tab, where you can specify the options that they will be able to access from their menu.

Users who will be able to login as Supporters will enable the 'Admin Mode' and 'Support Mode' tabs.

The 'Admin Mode' tab presents the options for the Supporter acting on their own to provide support for a pre-installed agent.

The 'Support Mode' tab presents options for the Supporter answering to a support request, initiated by an agent.

In both of these tabs you can configure whether the different actions the Supporter can perform on the agent's computer will prompt the agent for consent, or will be automatically accepted or denied.

Remember that these settings are configured for each User/Group of Users separately.

1.3 Install and Configure an Agent

The SupportSmith Agent is the module installed in the agents' PCs. Each agent will have a shortcut in the traybar with options for requesting support.

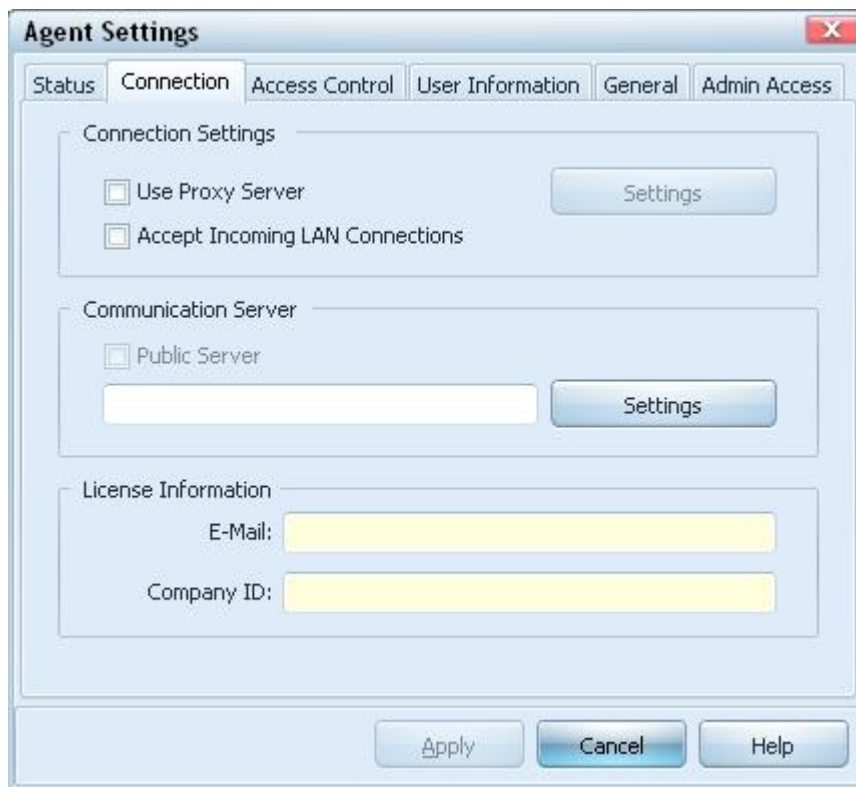
From the agent's computer, run the SupportSmith v2 Agent.msi setup and proceed with the installation. At finish, start the SupportSmith Agent Manager from the Start/Programs menu to configure the Connection Settings:

1. Connection details

In the 'Connection' tab, click on the 'Settings' button inside of 'Communication Server'. In the 'Address' and 'Port' fields, you need to enter the internet IP or DNS name of your server, and port. Use the same information you have entered in the SupportSmith Server Manager, in the 'Communications' tab. This will tell the agent computer where to connect. In the 'Username' and 'Password' fields, complete with a valid DOMAIN\User and Password, corresponding to the Users you have configured in the SupportSmith Server Manager in the 'Access Control' tab, that are marked as Pre-Installed Agents.

2. License information

Enter the Email & CompanyID you'll find on the .txt license file.



3. Check Status

Press 'Apply' and check the 'Status' tab to see if the agent is properly connected.

1.4 Install Support Tools

The SupportSmith Supporter Tools is the module installed in the supporters' PCs. Each supporter will be able to receive or initiate support requests.

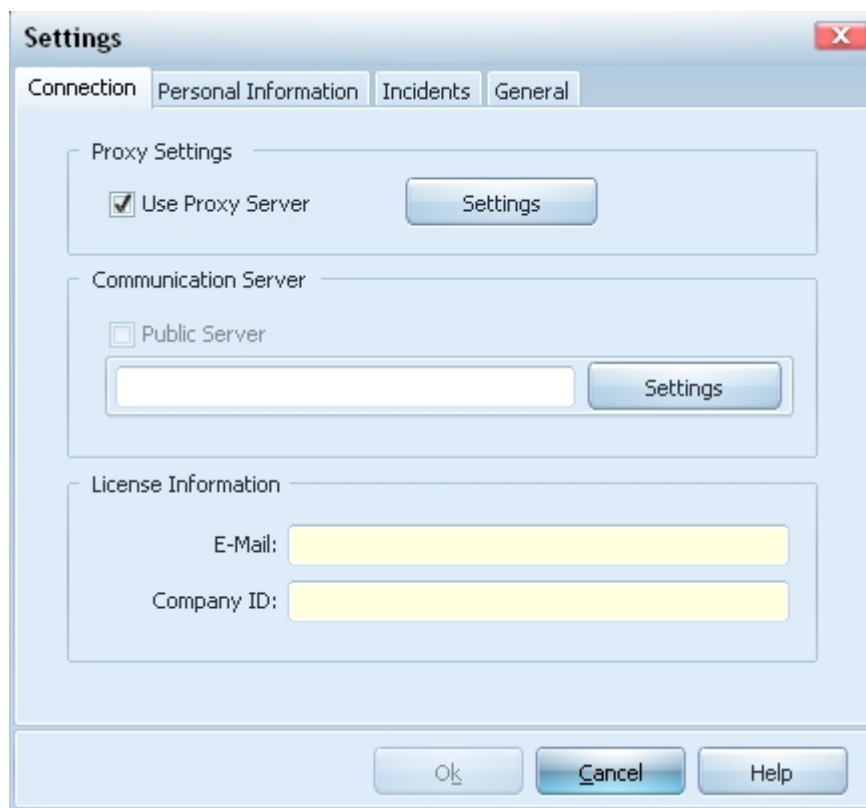
Run SupportSmith v2 Supporter Tools.msi at the supporter's PC and proceed with the installation. At finish, start the SupportSmith Support Manager from the Start/Programs menu, and go to 'File' - 'Settings'. this will launch the page to configure the Connection Settings:

1. Connection Details

In the 'Connection' tab, click on the 'Settings' button inside of 'Communication Server'. In the 'Address' and 'Port' fields, you need to enter the internet IP or DNS name of your server, and port. Use the same information you have entered in the SupportSmith Server Manager, in the 'Communications' tab. This will tell the support computer where to connect.

2. License information

Enter the Email & CompanyID you'll find on the .txt license file.



The screenshot shows the 'Settings' dialog box with the 'Connection' tab selected. The dialog has four tabs: 'Connection', 'Personal Information', 'Incidents', and 'General'. The 'Connection' tab contains three sections: 'Proxy Settings', 'Communication Server', and 'License Information'. In 'Proxy Settings', the 'Use Proxy Server' checkbox is checked, and there is a 'Settings' button. In 'Communication Server', the 'Public Server' checkbox is unchecked, and there is a text input field followed by a 'Settings' button. In 'License Information', there are two text input fields labeled 'E-Mail:' and 'Company ID:'. At the bottom of the dialog are 'Ok', 'Cancel', and 'Help' buttons.

1.5 Trying the first Support Session

After following these steps, you are ready to provide and receive Remote Support:

- a. Accessing the remote PC through the Support Manager.

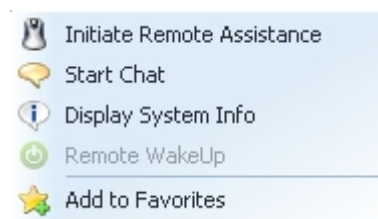
Login Screen



Supporter Manager



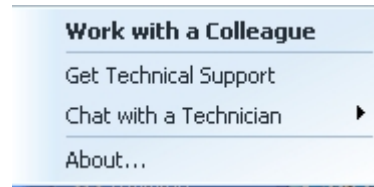
1. Launch the Support Manager.
Login to the Support Manager. In the 'Username' and 'Password' fields, complete with a valid DOMAIN\User and Password, corresponding to the Users set in the SupportSmith Server Manager as Supporters.
2. Select a Computer to start a remote session.
From the 'Admin mode' tab, choose one of the computers available for support. These are all the computers where the Pre-Installed agent is installed.
Right click on the selected PC and choose: 'Initiate Remote Assistance' from the context menu:



In the 'Remote Control' tab of the resulting screen, you have the necessary options to try out your first admin-mode support session.

b. Requesting Support from the Pre-Installed Agent's menu.

1. Make a right click over the Agent's icon at the tray bar.

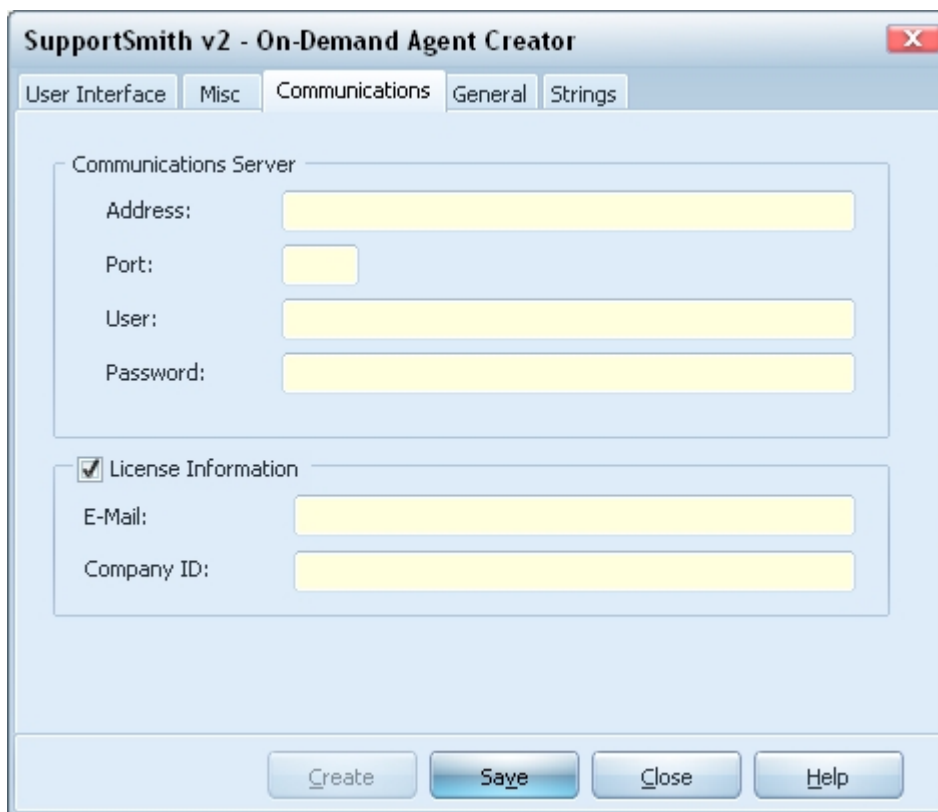


2. Click on 'Get Technical Support' and then 'Get Help'.
3. This will place a request on the supporter's computer: go to the Support Manager, open the 'Support Queue' tab and start the remote session by right-clicking on the request and choosing 'Start Remote Session'.

1.6 Install On-Demand Agent Creator

The SupportSmith On-Demand Agent Creator is a tool for generating agent modules on demand. This means that if you need to give support to a computer that doesn't have a Pre-Installed Agent (e.g. users out of the company) you can still do it.

Run the SupportSmith v2 On-Demand Agent Creator.msi setup and proceed with the installation. At finish, start the SupportSmith On-Demand Agent Creator from the Start/Programs menu:



1. Connection details

In the 'Communications' tab, fill in the 'Address' and 'Port' fields with the internet IP or DNS name of your server, and port. Use the same information you have entered in the SupportSmith Server Manager, in the 'Communications' tab. This will tell the on-demand agent computer where to connect.

In the 'Username' and 'Password' fields, complete with a valid DOMAIN\User and Password, corresponding to the Users set in the SupportSmith Server Manager in the 'Access Control' tab, marked as On-Demand Agents.

Enter the License Information from the txt.

2. Create the On-Demand Agent.

Press the 'Create' button.

A file named 'SsCM.exe' will be created. You can look for it in the folder

specified in the 'General' tab, in the 'Destination Directory' field. This is the file you need to distribute.

3. Try the On-Demand Agent

Execute the 'SsCM.exe' from another computer. Fill in the details and press the 'Get Help' button. This will place a request on the supporter's machine, and from then on, the supporter can provide remote help.

1.7 Technical Information

- Required Setup files:

- Server
SupportSmith v2 Server.msi
- Supporter Tools
SupportSmith v2 Support Tools.msi
- Pre-Installed Agent
SupportSmith v2 Agent.msi
- On-Demand Agent Creator
SupportSmith v2 On-Demand Agent Creator.msi
- License files (.xml and .txt)
Get yours! Apply for a 30-day free evaluation License on our website.



Get registered at:

www.supportsmith.com

- After Setup, files can be found at:

- Start > Programs > SupportSmith v2
- C:\Program Files\SupportSmith v2
- C:\Documents and Settings*user*\Application Data\Cybele Software\SupportSmith v2\
- C:\Documents and Settings*user*\My Documents\Cybele Software\SupportSmith v2\

- General System Requirements:

- Intel Pentium or equivalent processor
- OS: Windows XP, Windows Vista.
- CPU: 128MB of RAM (256MB recommended)
- Free hard-disk space: Server 10MB; Supporter 15MB; PreInstalled Agent 25MB ; On-Demand Agent 5MB.

- Configuration Information you will be required:

- Private IP/URL & Port to access the server (for network access)
- Public IP/URL & Port to access the server (for external access)
- Proxy settings (if applies)
- Domain, User and Password (to test Login as Technician)

- Got questions? Email us! support@cybelesoft.com