

GoToAssist Express Best Practices Guide to Unattended Support

One of the most useful features of GoToAssist® Express™, Unattended Support enables support providers to deliver assistance to a customer's PC even when the customer is not present. Unattended Support multiplies the convenience and productivity of attended remote support. Technical problem resolution or routine maintenance can be flexibly scheduled at times most convenient for both the support provider and the customer, even after normal work hours.

Drawing on the ideas and experiences of IT professionals, help desk managers and consultants, we have compiled this best practices fact sheet to help you get the most out of Unattended Support and our remote support solution.

How Unattended Support works

During a live support session, you, the support technician, send the customer a request asking permission to install Unattended Support on their PC. Once permission is granted, you create a nickname and an access code for the computer, enabling you to access that machine when the client is away. Or, during an onsite visit, you can log in to GoToAssist Express and perform the installation directly on your customer's computer.

When you want to access that computer, click the GoToAssist Express system tray icon, select the computer from your list of unattended computers and type in your access code. Now you are ready to use all GoToAssist's remote-support tools and features, including reboot and reconnect.

(Note: Your customers need to leave their computers ON for you to work on them remotely. Unattended Support is currently unavailable for use with Mac® computers.)

Summary best practices

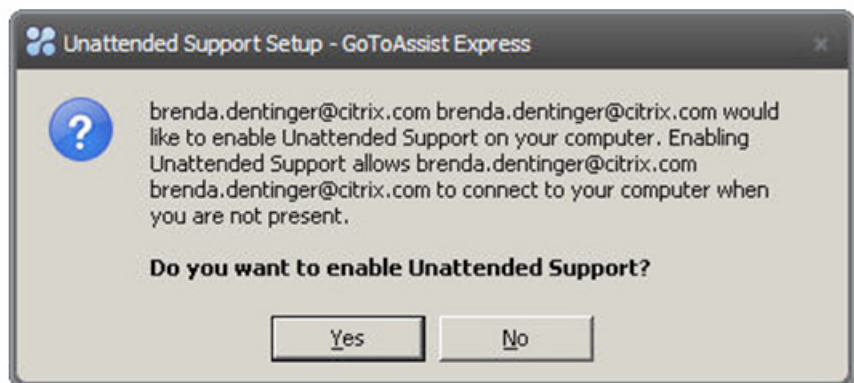
- When setting up Unattended Support, explain to your customer how Unattended Support will let you access their computer and deliver technical support when they are not present.
- Give the customer a tour of the system tray once Unattended Support is installed. Show them how to revoke access or block it temporarily at any time.

- Establish ground rules. Decide with your customer on the times of day you are likely to access their computer.
- Call or email your customer ahead of time when you'll be accessing their computer.
- Provide your customer with a report of your Unattended Support work.
- Always choose the longest, most complex access code you can tolerate.
- Organize your list of Unattended Support computers for easy access. Choose names for your unattended machines that will best utilize the GoToAssist Express search function.

Obtaining your customer's permission and building trust

When setting up Unattended Support, always explain to your customer how Unattended Support will let you access their computer and deliver technical support when they are not present.

Unattended Support may be installed during a remote support session or when the support provider is on-site, physically at the customers' machine. When the support provider requests unattended support privileges during a remote support session, GoToAssist shows the customer an informative dialog and asks their permission to install Unattended Support. The customer must give consent; the support provider is not allowed to interact with the approval dialog on behalf of the customer.



The support provider may also set up Unattended Support when engaged in on-site support. In this case, the request and customer approval are made in either verbal or written form.

At the end of the day, your customer places their trust in you – the person with whom they have a business relationship – and not in any piece of software. It's important that you build their trust in you by talking them through the process and explaining the concept of Unattended Support to them. Explain when and how you will be using this GoToAssist functionality.

Once you've installed Unattended Support, give the customer a tour of the system tray. Show them how to revoke access or block it temporarily at any time.



Maintaining security with access codes

Once the customer has approved the implementation of Unattended Support, the support provider needs to choose a strong access code.

Always choose the longest, most complex access code you can tolerate.

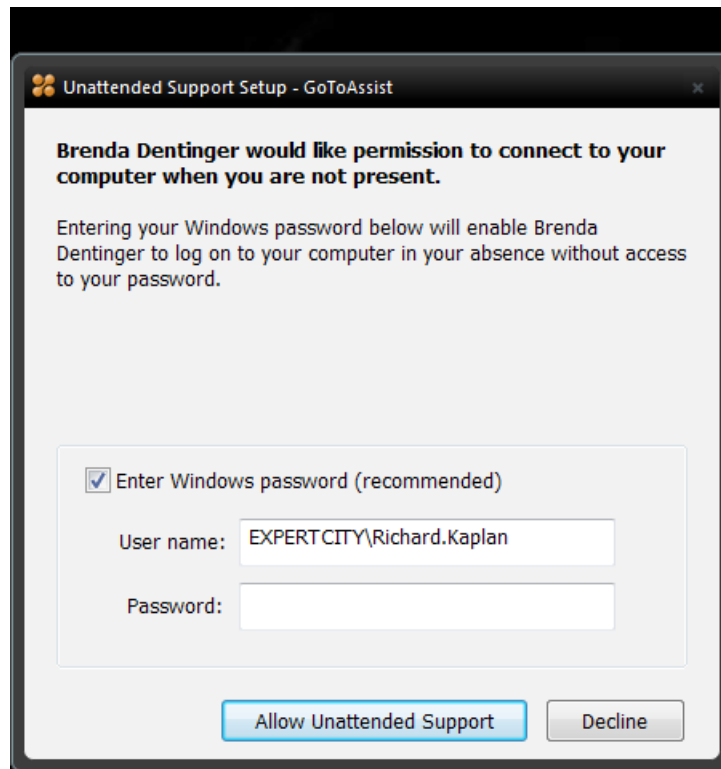
It's better to choose a real doozy, write it down and put it in your wallet, than to choose something easy to guess. Bear in mind that the access code is the cornerstone of the security guarantees that GoToAssist provides.

Choose a different access code for every unattended host you set up. If someone manages to learn one of your access codes, they won't be able to leap-frog into every computer that you manage.

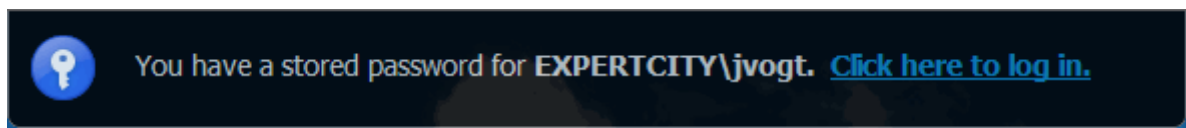
Along with providing the correct access code, the support provider must provide any Windows or application authentication credentials required when accessing an unattended support computer. Local security controls on the customer's PC are never overridden.

Note: Your customer's Windows password can be encrypted and stored on their PC. During the initial Unattended Support setup, the customer will be prompted to enter their password, which remains private and is never transmitted over the Internet.

At your customer's Windows login, you can then click a link at the top of the GoToAssist screen to populate the password field with the customer's private Windows password.



In addition, if the customer agrees to this password storage, they will need to reenter the password with every Windows password alteration, usually every 90 days.



Scheduling and initiating unattended sessions

It's a good idea to call or email your customer ahead of time when you'll be accessing their computer.

Even though your customer has given you permission, they may find it disorienting to have someone jump into their computer while they are using it.

Remember to check the computer status in the Unattended Support dialog before you connect. Computers that show up as "in use" are being actively used by someone who is physically at the machine, and you should think twice (or maybe call them) before connecting.

Establish ground rules with customer. When you set up Unattended Support, decide with your customer on the times of day you are likely to access their computer.

Find a schedule that works for them and honor it.

Keeping a record of all work and informing customers

Use GoToAssist's session notes feature to keep a log of what you do during every Unattended Support session.

As a best practice, we recommend you provide your customer with a report of your Unattended Support work.

Email or call your customer after every session and notify them of what you did. You can even generate a weekly or monthly report of session notes and send it to your customer to demonstrate the value you've provided.

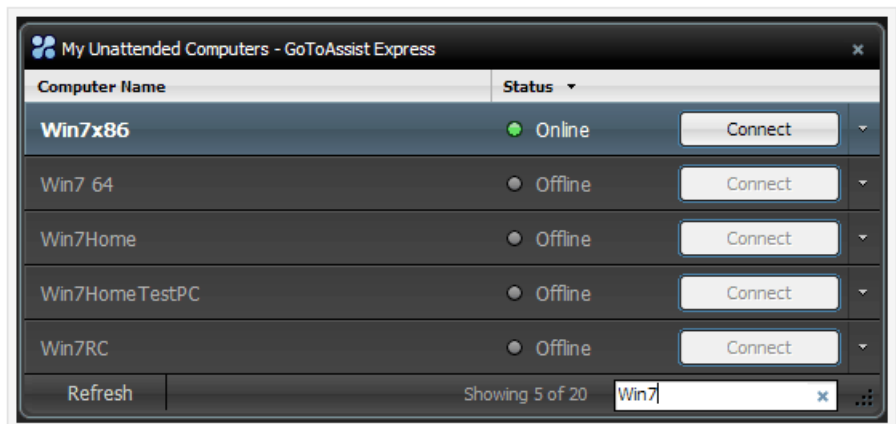
Organizing your list of Unattended Support machines

As you add more and more computers to your Unattended Support list, it can become tricky to quickly locate the one you're after. It's necessary to organize your list of Unattended machines so that it's easy to find the one you desire.

Organize your list of Unattended Support computers for easy access. Choose names for your unattended machines that will best utilize the GoToAssist Express search function.

First, note that the Unattended Support list has a search tool located in the lower right corner to help you locate the desired PC. The search function is subtractive so as you enter characters the names that do not match are removed.

The trick is to decide on a naming convention for Unattended machines that makes good use of this search, for example Company Initials: Department:



User Name = CTX:GCS:GlennD

This simple naming convention will make supporting multiple clients and users a lot easier. You can use this naming convention to organize and group machines by company, department or other subsets. As an added bonus, your reports will be easier to read when it comes to billing for your services.

For more discussion of the Unattended Support feature, please consult the [GoToAssist Express User Guide](#). Other suggestions for best practices? Log in and post them on the GoToAssist Express Forum.

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