eCare 5.0 Support Agent's Guide

Last Modified August, 2007

Motorola, Inc.
Marketplace Tower
6001 Shellmound Street, 4th Floor
Emeryville, CA 94608
USA

Part Number

This manual is Motorola part number 6161147-PF-06.

Contents

Chapter 1: Introduction to eCare

Welcome to eCare!

The 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 10.4.0 or greater eCare 4.5 runs on both PowerPC and Intel-based Macintosh computers
Web Browser	Internet Explorer 6.0 – 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**

Note: Internet Explorer 5.5 and Mac OS X 10.3.9 are still supported for your eCare customers. However, as a Support Agent, you must use more current versions.

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

Settings for Windows Computers

To prevent Internet Explorer settings from interfering with eCare communications, you must set your eCare server as a Internet Explorer Trusted Site. For example, if the URL for your eCare service is

http://help.ecare.com/support

add *http://help.ecare.com* to your list of Trusted Sites.

The default Trusted Site settings allow for normal eCare operations. If you wish to use a *Custom* Security setting for Trusted Sites, however, you may set the following individual options.

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.

Downloading and Installing the eCare Remote-Control Component

Before you can use eCare's screen-sharing services—Control, Observe, Show My Screen, and Give User Control—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 8.)

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, Motorola 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 7.)

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, Motorola 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.

Accessing the eCare Service

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

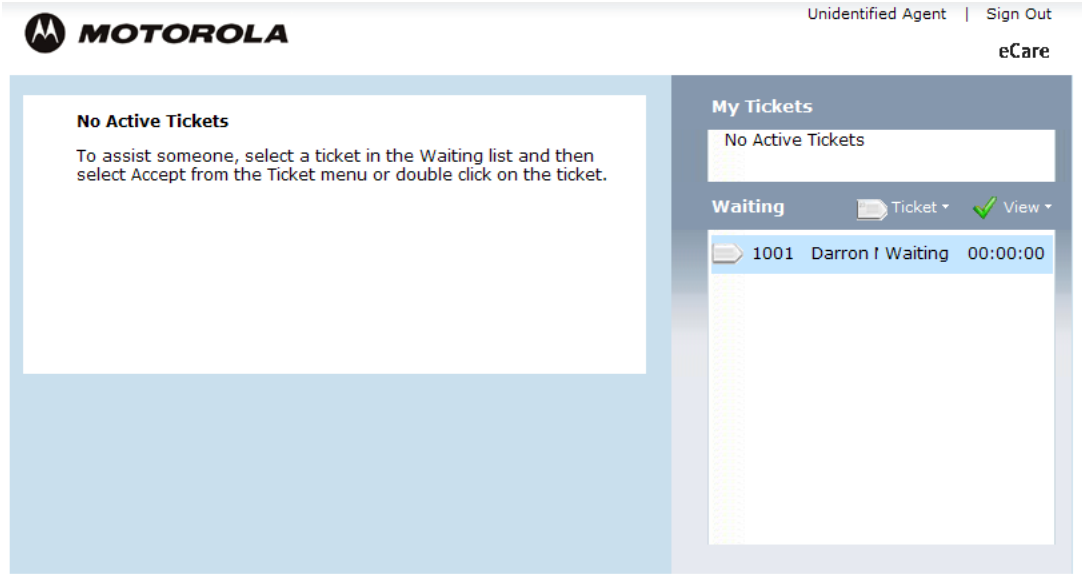
http://‹*ecare-server*›/‹*service-name*›/agent

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 "Selecting a Ticket" on page 15) or send an email invitation to a customer who has not entered a trouble ticket (see "Sending an Email Invitation" on page 17). You also have the option to change your eCare password. See "Changing Your Password" on page 19.

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*.)

Chapter 2: 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 Send Invitation service 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.

Note: You may also email an eCare 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 17.

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 Send Invitation service to open the trouble ticket and email it to the customer. (Creating the invitation is discussed in "Sending an Email Invitation" on page 17.)

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. (The link will still load the eCare service, but the customer will be required to submit a new trouble ticket.) 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 Remote System service, described in "Reboot Remote System" on page 29.

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.

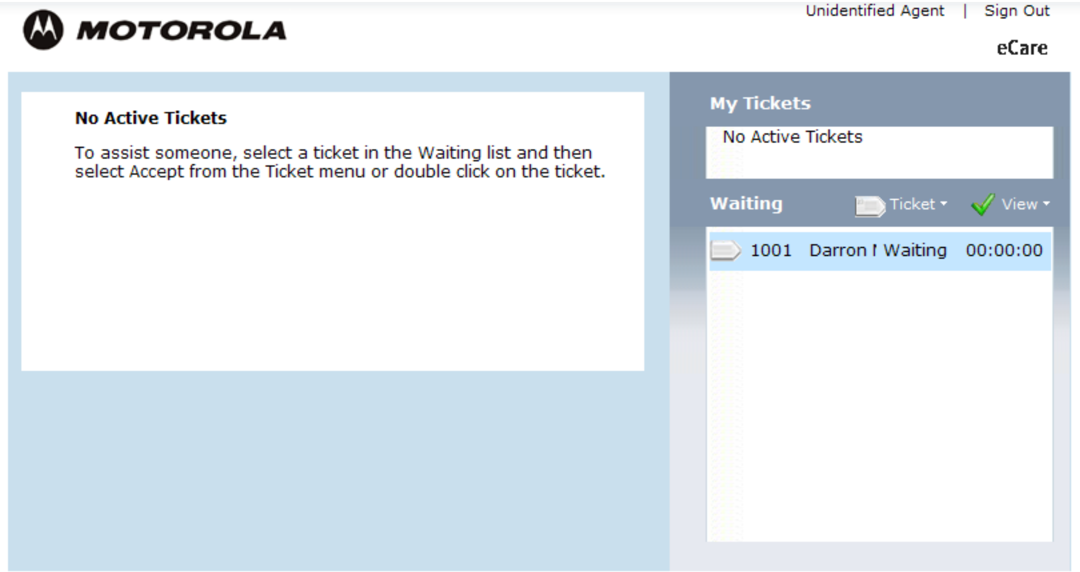
If the customer clicks *Yes*, eCare saves a unique URL as a shortcut on the customer's desktop. If the eCare session is interrupted, the customer can double-click the shortcut to return to the trouble-ticket queue with the same ticket ID as before. The eCare session window is displayed, displaying the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

Chapter 3: Working with eCare

When you sign in to the eCare system, the eCare session window appears.



When you first sign in to the eCare system, both the *Active Tickets* and *My Tickets* areas display the message *No Active Tickets*. The *Waiting* area displays the current trouble-ticket queue. (You can use the *View* menu to sort the queue by a specified criterion.)

When you select the first customer to assist, the *Active Tickets* area will display your activity with the customer. The *My Tickets* area will list this customer and, later, any additional customers whose trouble tickets you also accept. Click a customer's name in the *My Tickets* list to switch your *Active Ticket* to that customer's trouble ticket.

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 10 for more information.) You do not need to be signed in to the eCare system to receive email notifications.

Selecting a Ticket

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

- Select a trouble ticket in the *Waiting* area and move your mouse over the *Ticket* menu to display a list of options. You may accept or delete the trouble ticket.

  Double-click a trouble ticket in the *Waiting* area to accept the request and begin helping the customer.

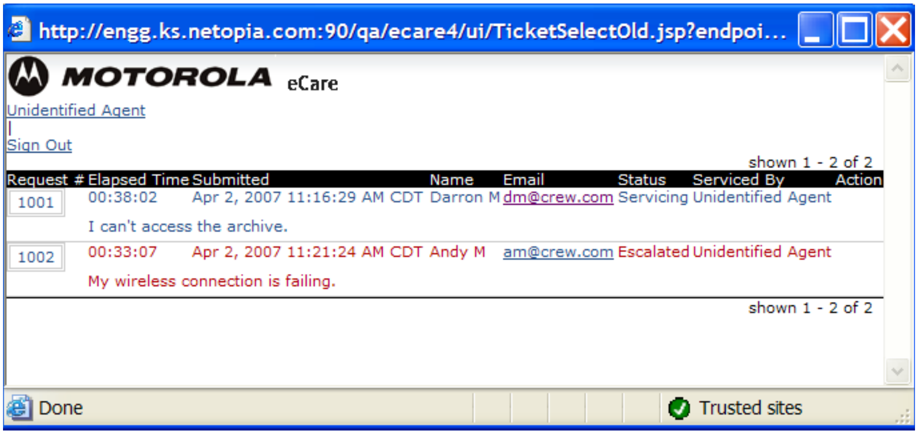
  Note: The *Delete Ticket* option is available only if your Support Agent profile has been assigned this privilege.

- Move your mouse over the *Ticket* menu and choose *Send Invitation* to open a trouble ticket and email it to the customer you specify. See “Sending an Email Invitation” on page 17 for more information.

- Move your mouse over the *View* menu to display a list of options for sorting the trouble-ticket queue.

  Choose *View All Tickets* to open a new window that lists the active trouble tickets in more detail, including a summary of the customer’s support issue.

Using the View All Tickets Window



The View All Tickets window displays all trouble tickets in your queue and includes more detail than is shown in the *Waiting* area.

- 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 trouble ticket and begin helping the customer, select a trouble ticket in the *Waiting* area. Move your mouse over the *Ticket* menu and choose *Accept Ticket*. Or double-click the desired trouble ticket.

You may choose the first request in the queue whose status is *Waiting* or *Escalated*, use the View All Tickets window to 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 in the trouble-ticket queue, you are connected to the customer. *The Active Tickets* area changes to display the session transcript panel, and a number of control menus appear above and below the transcript. See "Interacting with the Customer" on page 20.

Deleting a Request from the Queue

To delete a request from the queue, select the ticket and move your mouse over the *Ticket* menu. Then select *Delete Ticket*.

Remember that the *Delete Ticket* option is available only if your Support Agent profile has been assigned this privilege.

Resolved requests are deleted from the queue automatically.

Sending an Email Invitation

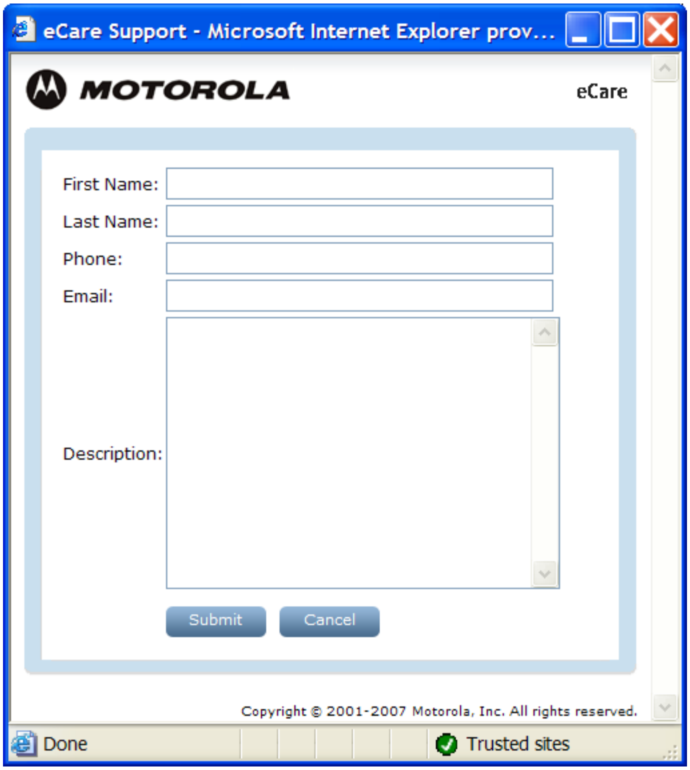
In some situations, such as when you are assisting a customer on the phone and need to begin an eCare session, it may be easier for you to fill out the trouble-ticket form on the customer's behalf. You can use the Send Invitation service to open the trouble ticket and email it to the customer.

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. Move your mouse over the *Ticket* menu and choose *Send Invitation*.



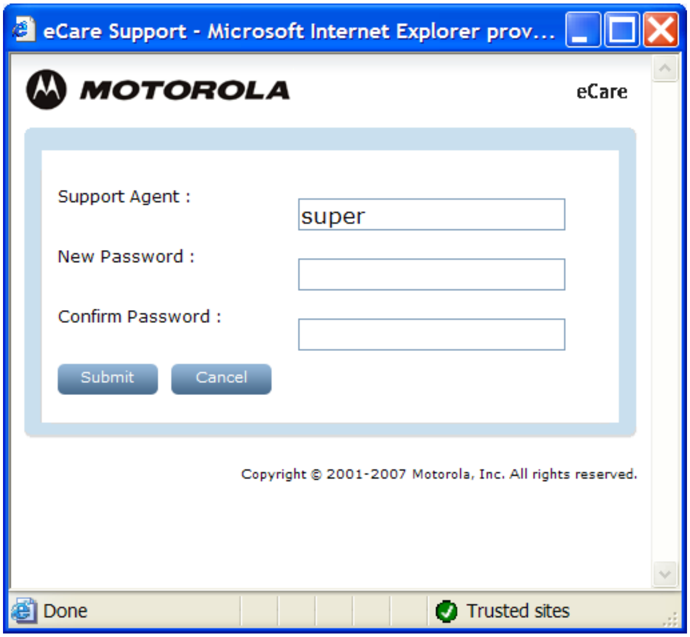
2. Enter the customer's information in the appropriate fields. (Note that only the email address is required.) Be sure to double-check the email address; if you enter the address incorrectly, the customer will not receive the invitation.
3. Click *Submit* to send the email message to the email address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

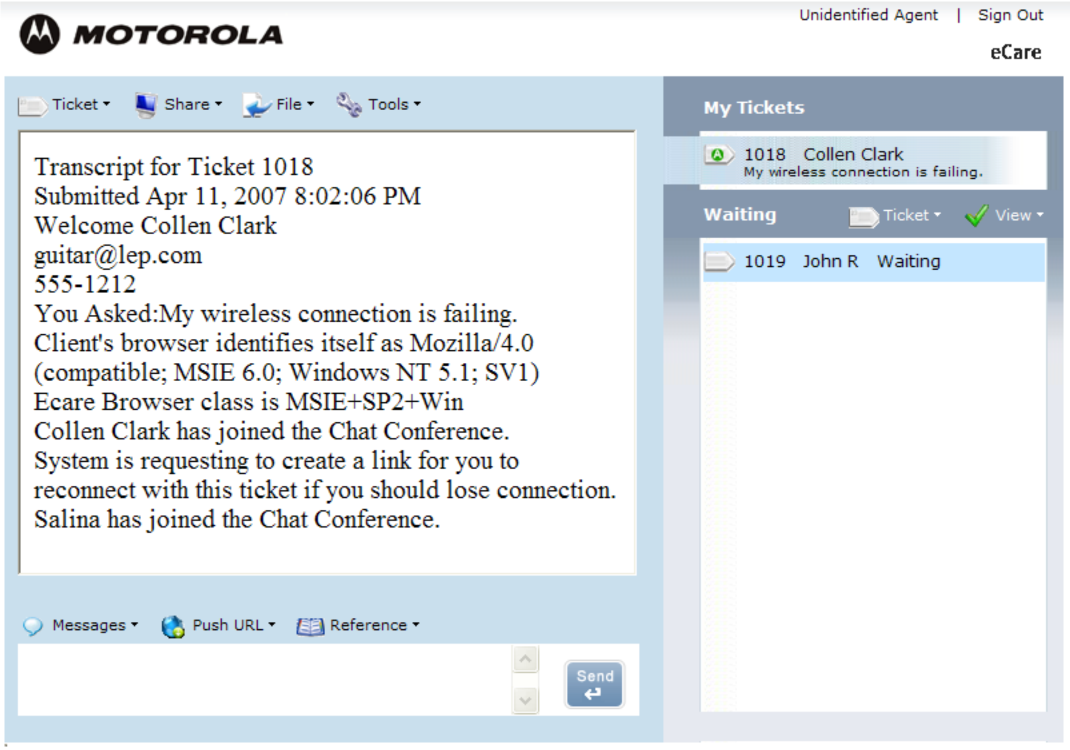
To change your eCare password, click your name at the upper-right corner of the eCare session window.



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 trouble-ticket queue, you are connected to the customer. The *Active Tickets* area changes to display the session transcript panel, and a number of control menus appear above and below the transcript.



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

The Active Tickets Area

In the middle of the *Active Tickets* area, the *session transcript panel* displays the activity that occurs during your eCare session. At the beginning of the transcript, eCare displays the ticket number and the customer's contact and trouble-ticket information. As you work with the customer, the session transcript will display a record of your conversation and the eCare services you use.

Note: 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.

The text-chat area appears below the session transcript panel. In most cases, you will begin your eCare session by chatting with the customer about their support issue. Enter text in the text-chat area and click *Send* to begin the conversation.

The Control Menus

At the top of the eCare session window, above the session transcript panel, are the *Ticket* menu and up to three *service menus*: *Share*, *Files*, and *Tools*. Below the session transcript panel are up to three additional menus: *Messages*, *Push URL*, and *Reference*.

The Ticket Menu

The *Ticket* menu includes three options: *Resolve*, *Escalate*, and *Request Transcript*.

- You will use the *Resolve* and *Escalate* options to close the eCare session window when you are finished working with the customer (see "Ending a Support Session" on page 32).
- At any time during the eCare session, you may select the *Request Transcript* option. When the session is complete, the eCare server will email you a session transcript. (The *Request Transcript* option is not available if the eCare administrator did not enter your email address in your Support Agent profile.)

  Note: If the customer entered an email address in the trouble ticket, the *Email Transcript* link will appear at the top right of their eCare session window. You may wish to inform the customer that they can request the transcript to save for future reference. Remind the customer that the transcript will be sent when the session is complete; it will not be sent immediately.

The Service Menus

The service menus list options that allow you to activate the different eCare *services*. Each eCare service enables you to interact with the customer (or the customer's computer) in a different way.

However, in certain cases, some eCare services may not be available.

- 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 be assigned "premium agent" privileges. Contact your eCare administrator if you believe your service privileges are incorrect.
- Your eCare administrator may configure your eCare installation to remove certain services entirely. In this situation, the associated menus and options will not appear in the eCare session window.
- 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 options may be disabled.

See "eCare Services and the Service Menus" on page 23 for information about service menus and the options 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 problem the customer is having and the type of service that is needed.

Enter text in the text-chat area and click *Send* to send the message to the customer. Or select a message from the *Messages* menu, which displays a customized list of standard chat phrases you can select and send. (The *Messages* menu will not appear if your eCare administrator has not configured any chat phrases. See your eCare administrator for more information about this option.)

Once you have discussed the problem with the customer, use the service menus above the session transcript panel to select and launch the service you need to assist the customer. See the following section, "eCare Services and the Service Menus," for more information on each service.

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.

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

eCare Services and the Service Menus

When chatting with the customer isn't enough to resolve their problem, you can use additional eCare services to assist them further. Use the service menus above the session transcript panel to select and launch the service you need to assist the customer. Depending on your eCare installation, you may be able to

- Use services from the *Share* menu to directly view or control the customer's computer or allow the customer to control or view your computer. See the following section, "The Share Menu."
- Use services from the *File* menu to send a file to the customer's computer or request a file from the customer. See "The File Menu" on page 26.
- Use services from the *Tools* menu to generate a "snapshot" of the hardware and software on the remote computer or reboot the remote computer. See "The Tools Menu" on page 27.
- Use options from the *Messages*, *Push URL*, and *Reference* menus to send a pre-configured chat message, 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 Messages, Push URL, and Reference Menus" on page 30.

The Share Menu

With the services on the *Share* menu, you may directly view or control the customer's computer or allow the customer to control or view your computer. These services are collectively known as *screen-sharing services*. The services you may use are discussed in the following sections.

Depending on your eCare installation, the first time you launch one of the services on the *Share* menu, you or the customer (or both) may be prompted to download and install the eCare remote-control component. Your eCare administrator can provide this information. 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 7 for details.

The *Share* menu will not appear if your eCare installation does not support it, or if screen-sharing privileges are not granted to your Support Agent account. If the current eCare session will not support screen-sharing—for example, if the customer is not using a supported Web browser— the *Share* menu will appear, but its options will be disabled.

If the *Share* menu's options are disabled, make sure that your customer is using a supported Web browser and confirm that they downloaded the eCare remote-control component. (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.

Using the Control Service

The Control service grants you, as the Support Agent, 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.

Open the *Share* menu and choose *Control* 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 26 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.

Using the Observe Service

The Observe service allows you to view the remote computer's desktop while the customer maintains control over the machine. With Observe, 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. The Observe service allows you to watch the remote computer but assures the customer that you cannot make any changes to their computer.

Open the *Share* menu and choose *Observe* 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 26 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.

Using the Show My Screen Service

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

Open the *Share* menu and choose *Show My Screen* 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 26 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.

Using the Give User Control Service

The Give User Control service is similar to Share My View, but the customer will have direct control of your machine. You can use the Give User Control 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.

Open the *Share* menu and choose *Give User Control* 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 26 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.

Setting Color Depth

In addition to activating the screen-sharing services, options on the *Share* menu allow you to specify the color depth of a screen-sharing session. Before you launch a screen-sharing session, you may wish to select a color depth from the options listed at the bottom of the *Share* menu. Fewer colors allow for faster screen-sharing.

The color-depth controls affect 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.

Approving Screen-Sharing Sessions

Before you can use the Control or Observe service to access the remote computer, the customer must approve it. Similarly, when you use the Show My Screen or Give User Control service to ask a customer to view your computer, you will need to grant permission before the connection can be completed.

When you choose the *Control* or *Observe* menu option, 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 Show My Screen or Give User Control 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.

The File Menu

With the services on the *File* menu, you can send a file to the customer's computer or request a file from the customer.

Using the Send a File Service

With the Send a File service, you can upload a file from your computer to the eCare server, allowing the customer to download the file. Use the Send a File service 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.

To send a file to the customer, open the *File* menu and choose *Send a File*. In the Send a File window, click the *Browse* button and locate the file you wish to send. Then click *Send File*.

The file is uploaded to the eCare server. A window appears on the remote computer, asking the customer to accept the download. The customer must click *Allow Download*. Then, the File Download window allows 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 a 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.

Using the Request a File Service

With the Request a File service, you can allow the customer to upload a file to the eCare server. For example, you may want the customer to send you log files or other documents that can help you diagnose their support issue.

To request a file from the customer, open the *File* menu and choose *Request a File*. The Send a File window opens on the customer's computer. The customer must click the *Browse* button, locate the file they wish to send, and click *Send File*.

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.

The Tools Menu

With the services on the *Tools* menu, you may 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. You may also reboot the remote computer.

Using the System Information Service

To generate a system report for the customer's computer, open the *Tools* menu and choose *System Information*.

The System Information 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 report includes 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 start the System Information service, 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 report. (This process may take a few moments.) For detailed information about the System Information report, see "Appendix A: Using the System Information Service" on page 33.

When you are finished with the System Information report, close the 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 System Information 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 System Information service again.

Reboot Remote System

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

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

1. To reboot the customer’s computer, open the *Tools* menu and choose *Reboot Remote System*.
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.

The Messages, Push URL, and Reference Menus

The Messages Menu

When you chat with your customers, you may use the same phrases repeatedly. Your eCare administrator can add these phrases to the *Messages* menu, which displays a customized list of standard chat phrases you can select and send. See your eCare administrator for more information about this option.

The Push URL Menu

The *Push URL* menu, which appears below the session transcript panel, provides a list of URLs that you may push to the customer's Web browser. The URL you choose 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 load a Web page on the customer's computer, select a URL from the *Push URL* menu. 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 Reference Menu

The *Reference* menu, which appears below the session transcript panel, provides a list of URLs that you may load on your own computer. This 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 load a Web page on your computer, select a URL from the *Reference* menu. A new browser window opens on your computer with the specified URL loaded automatically.

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 "Appendix B: Responding to eCare Surveys" on page 38.) 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, open the *Ticket* menu and choose *Resolve*.

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, open the *Ticket* menu and choose *Escalate* 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 choosing the *Resolve* or *Escalate* option.

Appendix A: Using the System Information Service

The System Information 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.

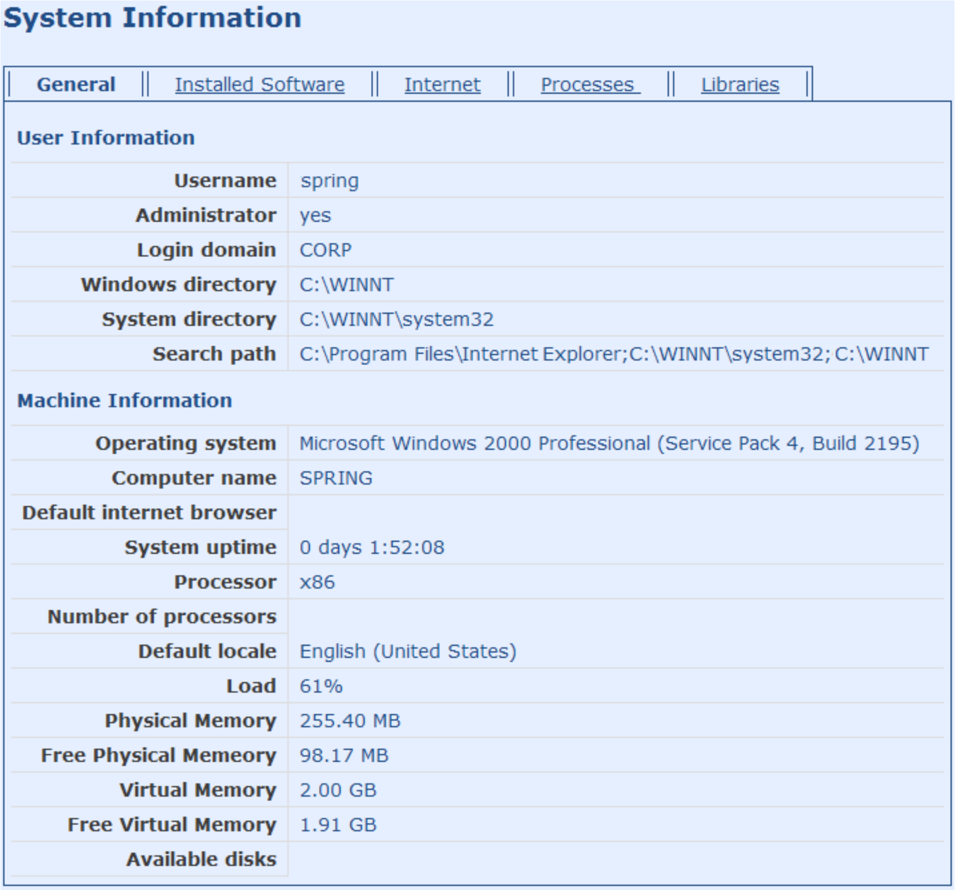
Note: This appendix covers the System Information report only for Windows computers.

Generating the System Information Report

To generate a system report for the customer's computer, open the *Tools* menu and choose *System Information*.

When you start the System Information service, 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 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 35.
- *Installed Software*, which provides a complete list of the registered software installed on the remote computer. See page 35.
- *Internet*, which provides a summary of the Internet Explorer setup on the remote computer. See page 36.
- *Processes*, which provides a complete list of the processes running on the remote computer. See page 36.
- *Libraries*, which provides a complete list of the libraries (DLL files) on the remote computer and the specific version of each library. See page 36.

Using the System Information 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 System Information 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 System Information report, close the 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 System Information 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 System Information service again.

Appendix B: Responding to eCare Surveys

Your eCare administrator may configure your eCare service to display a survey when you resolve (or escalate) a trouble ticket or 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.

Appendix C: 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.