Remote Support Just Got Easier!

SupportSmith

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1 SupportSmith v2.0

SupportSmith 2.0 is an integrated platform that provides Remote Assistance and Remote Access to another desktop with no network barriers.

You can now get connected safely and instantly to any other PC over the internet, with unlimited access to provide and receive Customer Support, transfer files, share single applications and even give presentations remotely.

SupportSmith 2.0 gives you:

* Remote Desktop view, control, and sharing.
* Remote Desktop's System overview.
* Live Customer Support procedures.
* Ticket System for Support Incidents.
* Online Collaboration.
* File Transfer.
* Remote Shell.
* Chat.

It also:

* Provides great simplicity; no network configuration is needed.
* Has unparalleled security.

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2 Components

SupportSmith 2.0 establishes outgoing SSH-2 128-bit encrypted communications, allowing to pass through firewalls, NAT routers and proxy servers, in a secure and reliable fashion between its 3 components:

1. **SupportSmith Server**
   - Handles the exchange between the Support Manager and the Agents.
   - Manages the Ticket system.
   - Establishes permission levels and security parameters.

2. **Support Manager**
   - Monitors online Pre-Installed Agents.
   - Access System Overview Pre-Installed Agents's positions.

3. **Agents**
   a. **Pre-Installed Agents**
      - Requests Support.
      - Enables unattended remote access.
      - Enables chat, status monitoring and remote System Overview.
      - Enables File Transfer, Remote Shell, System Information Reports for all remote sessions.
      - Enables to share a Windows Application or the whole desktop with a Colleague.
      - Includes a **Pre-Installed Agent Manager** that can be password restricted.
   b. **On-Demand Agents**
      - Requests Support.
      - Enables File Transfer, Remote Shell, System Information Reports for all remote support sessions.
SUPPORTSMITH v2 COMPONENTS
1. Communication Server
2. Support Manager
3. Agents:
   - Pre-Installed
   - On-Demand
2.1 Server

2.1.1 Settings

2.1.1.1 Communications

**Communication Parameters**

**Bind to IP:**
Determines the binding IP address. If you do not assign a specific IP address, this service binds to all IP addresses assigned to this computer.

**Port:**
Indicates the listening port where this server can be reached. By default, port 22 will be selected.

**Public Host Address**

**Host**
Enter the Public IP for the main SupportSmith Server. This is the IP address that external users will access when requesting support or using any other SupportSmith
tool.

**Port:**
Indicates the listening port where this server can be reached. By default, port 22 will be selected.

**Multi server Environment**

**Broker List**
In case you have several SupportSmith Servers to balance your communications, this box will list any other SupportSmith Server acting as Broker.

**Host & Port options**

**Add Server**
Click the 'Add Server' button to add secondary Servers as Brokers. A new box will come up, to enter Address, port, username and password for the Server acting as Broker.

**Remove Server**
Click the 'Remove Server' button to remove secondary Servers from the Broker's list.
2.1.1.2 Access Control

Assigning Permissions

**Group or Names**
This box shows a list of User Groups or User Names authorized to run SupportSmith.

**Edit**
Click the button to Edit the list, adding/removing Users or Groups with the < and > buttons..

Settings for Each User

- Logins
  Allows you to determine which components can be used by each User/Group.
Components

- **Admin Mode**
  Allows you to customize the access rule for each User/Group while working in Admin Mode.
- **Support Mode**
  Allows you to customize the access rule for each User/Group while working in Support Mode.
- **Agent Features**
  Allows you to customize the options available to Pre-Installed Agents according each User/Group.

2.1.1.2.1 Logins

Select an item from the list above and check the Roles assigned to that User or Group.

Pre-Installed Agent and Supporter Roles enable the Admin Mode, Support Mode and Agent Features tab that will require your attention.

⚠️ This action must be taken for each User or Group.

![SupportSmith Server Manager](image)

⚠️ This Server can manage access additional Cybele Software’s products or components, and that is why you’ll see other components listed, such as SharingGlass.

A typical configuration for SupportSmith will require you to work with this options only:

- Logon as Communication Server
- Logon as Pre-Installed Agent
- Logon as On-Demand Agent
- Logon as Supporter
2.1.1.2.2 Remote Tool Access Rules

Rules for Admin and Support Modes

Permissions to use a remote tools from Technician end are ruled in Admin Mode and Support Mode Tabs. Each rule specifies whether a request to use a remote tool will be automatically accepted, denied or end-user managed.

Name
List of remote tools that a Technician can initiate.

Option
Action to be taken in regards to the Technician's request:
- **Prompt:** Prompts the Remote PC user for permission to proceed.
- **Accept:** Accepts the request without prompting the PC user.
- **Deny:** Denies the request without prompting the PC user.

Timeout
Specifies amount of time while prompt window will be displayed. Once elapsed this time, the request will be automatically accepted or denied according to Accept checkbox.

Accept
Specifies whether the request will be accepted or denied when Timeout expires.

Group
Allows you to group remote tools in order to specify overriding priority for each group. When an request to use a specific tool is accepted, all request for tools with same or lower priority (higher Priority number) belonging to the same group will be automatically accepted. Pre-defined groups are as follows:

<table>
<thead>
<tr>
<th>Group</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desktop Viewing</td>
</tr>
<tr>
<td></td>
<td>Desktop Control</td>
</tr>
<tr>
<td>2</td>
<td>File Transfer</td>
</tr>
<tr>
<td>3</td>
<td>Port Forwarding</td>
</tr>
<tr>
<td>4</td>
<td>Remote Shell</td>
</tr>
<tr>
<td>5</td>
<td>Remote Desktop</td>
</tr>
<tr>
<td>6</td>
<td>System Information</td>
</tr>
</tbody>
</table>

Priority
Indicates the priority for the tool within the specified group.

By default, SupportSmith will prompt the attendee for permission. You can change this option to Accept (will accept the request automatically) or Deny (will deny the access).
When access is denied, the Remote Customer isn't notified. The Technician will see an "Access Denied" message.

<table>
<thead>
<tr>
<th>Name</th>
<th>Option</th>
<th>Timeout</th>
<th>Accept</th>
<th>Group</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop Viewing</td>
<td>Prompt</td>
<td>0</td>
<td>X</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Desktop Control</td>
<td>Prompt</td>
<td>0</td>
<td>X</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>File Transfer</td>
<td>Accept</td>
<td>0</td>
<td>X</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Port Forwarding</td>
<td>Deny</td>
<td>0</td>
<td>X</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Remote Shell</td>
<td>Prompt</td>
<td>0</td>
<td>X</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Remote Desktop</td>
<td>Prompt</td>
<td>0</td>
<td>X</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Application Viewing</td>
<td>Prompt</td>
<td>0</td>
<td>X</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Application Control</td>
<td>Prompt</td>
<td>0</td>
<td>X</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

For instance, on the picture below, when the Technician wants to start the feature "Desktop Viewing", the Remote Customer will be prompted and the system will await for a response during 6 seconds, to finally Accept the request unless the Remote Customer denies the permission.

The other features will prompt and the system will indefinitely wait for a response.

2.1.1.2.2.1 Admin Mode

All rules specified in this tab will affect administrative authenticated remote access.

2.1.1.2.2.2 Support Mode

All rules specified in this tab will affect end-user requested remote access.
Enabling the features the PC user will see on the tray menu
Select an item from the list above and check the Features that User or Group will be able to use.

This action must be taken per User or Group.

How does the tray menu looks like?

- **Work with a Colleague**
  SupportSmith enables Application Sharing between all Pre-Installed Agents. Two Colleagues can work together on the same application or assist each other.

- **Get Technical Support**
  Request assistance to the Support personnel with one click.

- **Chat with a Technician**
  Get a quick answer for your inquiries chatting with a Technician.

- **Help**
  Opens the Help file that explains how to use the mentioned features.

- **About**
This box shows you some copyright information along with the version and build number for the SupportSmith Agent.

2.1.1.3 Licenses

SupportSmith Licenses

Description
The Description Box shows the Agents, Supporters and Channels allowed by your License.

Change Key
Click the 'Change Key' button to browse the folders and look for the .xml License file. The Description Box will show the Agents, Supporters and Channels allowed by your License.

License
A License can be Registered or Trial. In case you run SupportSmith with a Trial
License, the expiration date will be shown here. To ask for a trial extension, contact us.

2.1.1.4 General

**General Configuration Options**

![SupportSmith Server Manager](image)

**Ticket Format**

- **Prefix**
  Determine a Prefix for your Ticket.

- **Number of Digits**
  Select the number of digits for the Ticket.

- **Suffix**
  Add a suffix to your Ticket.

- **Initial Number**
  Select the number that will start the count on your Ticket system.

- **Preview**
  This box will show the preview of the Ticket format as you work on it.
**Language**

There are two Language options for the Server interface, English and Spanish. To change the Language interface, select the option and click Accept.

### 2.2 Support Tools

#### 2.2.1 User Interface

This section is intended to provide first-time users an initial approach to the basic functionality of the Support Tools of SupportSmith v2.

Browse through the following sections to start discovering all the Key Features:

- Tray Bar Icon and Menu
- Login Screen
- Support Manager
- Support Client
- Incident Viewer

#### 2.2.1.1 Tray Bar Icon and Menu

**Tray Bar Icon**

![Tray Bar Icon](image)

The Tray Bar Icon can be easily recognized. Its presence shows that the Support Manager is running. Make a double click on it to load the Support Manager Window.

**Tray Bar Menu**

![Tray Bar Menu](image)

The Tray Bar Menu can be launched by making a right click over the Tray Bar Icon. The menu has two options:

- **Manager**
  
  Loads the Support Manager Window.

- **Exit**
  
  Terminates SupportSmith. Any Chat or Remote Connection opened will be closed.

#### 2.2.1.2 Support Manager

**Login to the Support Manager**
### File

**Settings**
Opens the Manager Settings window.

**Exit**
Terminates SupportSmith. Any Chat or Remote Connection opened will be closed.

### Help

**Help**
Opens this Help File.

**Website**

**About**
Opens the About Box.

### Login

**User ID**
Enter a valid Windows User ID. The first time you log in, you must enter the user as DOMAIN\Username. After that, the Domain Field will retain your domain information and just the Username will be required.

**Password**
Enter the password required for the Windows User ID.

**Domain**
This field stores the Domain information you enter at the User ID field.

**Save User ID**
Check this box to save the User ID.

**Save Password**
Check this box to save the Password.

**Sign In**
Press the Sign In button to log into the Support Manager.

---

2.2.1.2.1 Support Manager Window

**First Support Manager View**
The Support Manager Window is the Start workspace for the Supporter, and it is composed by:

- The Main Menu
- The Main Toolbar
- The Right Side Tabs
  - Computers
  - Support Queue
  - Incidents
- The Filter Option
- The Status Bar

Each of this items will be described on this section.

### The Main Menu

#### File

- **Settings**
  Opens the Manager Settings window.

- **Sign Out**
  Closes the current session, and returns to Login screen. Any Chat or remote connection opened will be closed.

- **Exit**
  Terminates SupportSmith. Any Chat or remote connection opened will be closed.

#### Help

- **Help**
  Opens this Help File.

- **Website**

- **About**
  Opens the About Box.

### The Main Toolbar

- **Initiate Remote Assistance**
  Starts a Remote Assistance session with the Computer selected on the list below.

- **Start Chat**
SupportSmith v2.0

Initiates a Chat with the Computer selected.

**View Remote System Overview**
Opens a new window with a System Overview for the Computer selected.

**Wake Up**
Wakes up the Computer selected. This option might not work for all Computers.

**Favorites**
Shows only the Favorite Computers. If there are no Favorites, no Computers will be shown. To add Computers to your Favorite List, make a right click over the Computer name.

**Show Icons**
Shows big icons for each Computer, instead of the Detailed View.

**The Right Side Tabs**

**Computers**
Shows the Computers with connected agents Agents.
Read More...

**Customers**
Shows the Customers that started a Support Request.
Read More...

**Incidents**
Shows a list of past Incidents saved by the Supporter.
Read More...

**The Filter Option**

.Filter
Enter a word (or even a letter or number) and press the Filter button to filter the Computers by Computer name.

⚠️ The Filter does not work with Domain or User Name, it can just filter Computers. If the "Show Favorites" option is enabled, Filter will show only Favorite computers.

**The Status Bar**

.Status Bar
Shows the current connection status for the Supporter Manager.
2.2.1.2.1 About Box

This box shows you some copyright information and, most important, the version and build number you are running for the SupportSmith Agent. This version number should be included any time you report a connectivity error or other SupportSmith's issue to Cybele Software.

2.2.1.2.2 Support Queue Tab

Support Queue
This Tab shows Support Requests waiting for assistance and those who are already being assisted.

Each Support Request has its own Ticket Identification assigned by the SupportSmith Server.

Waiting for assistance

Access the available options by right-clicking over the Ticket or using the toolbar.

Once the remote assistance process starts, the Customer will be moved to the 'Being Assisted' panel.

Being assisted

This list shows the following details for each Customer:

- Customer's Name
- Supporter's Domain\User
- Local IP
- External IP
- MAC Address

Access the available options by making a right click over the Customer's name.

The Main Toolbar

The Main Toolbar will be active anytime a Customer is selected, enabling the following options:
**Initiate Remote Assistance**
Starts a Remote Assistance session with the Computer selected on the list below.

**Start Chat**
Initiates a Chat with the Computer selected.

**View Remote System Overview**
Opens a new window with a System Overview for the Computer selected.

**Wake Up**
Wakes up the Computer selected. This option might not work for all Computers.

### 2.2.1.2.3 Incidents Tab

**Case Archive**

This Tab shows all the incidents saved. After each Support session, an incident file will be saved for future references.

These files can be accessed from this window or using the Incident Viewer.

Make a double or right click over the Ticket code to open it.

### 2.2.1.2.4 Computers Tab

**Computers Currently Connected**
The Computers Tab lists all Computers with Agents currently connected to the SupportSmith Server.

This list shows the following details for each computer:

- Computer Name
- Username (Domain\User)
- Local IP
- External IP
- MAC Address

The Main Toolbar

**Initiate Remote Assistance**
Starts a Remote Assistance session with the Computer selected on the list below.

**Start Chat**
Initiates a Chat with the Computer selected.

**View Remote System Overview**
Opens a new window with a System Overview for the Computer selected.

**Wake Up**
Wakes up the Computer selected. This option might not work for all Computers.

**Favorites**
Shows only the Favorite Computers. If there are no Favorites, no Computers will be shown. To add Computers to your Favorite List, make a right click over the Computer name.

**Show Icons**
Shows big icons for each Computer, instead of the Detailed View.

The Filter Option

Filter
Enter a word (or even a letter or number) and press the Filter button to filter the Computers by Computer name.

The Filter does not work with Domain or User Name, it can just filter Computers. If the "Show Favorites" option is enabled, Filter will show only Favorite computers.

The Status Bar

The Status Bar
Shows the current connection status for the Supporter Manager.

2.2.1.3 Support Client

The Support Window

The Support Client contains the most important SupportSmith Tools for the Technician, and becomes the main workspace during a Remote Support session.

This workspace has the following pages:

- Start Page
- Remote Control
- File Manager
- Remote Shell
- System Information
2.2.1.3.1 Start Page

**First Overview to the Remote Computer**

The Start Page is the first view of the Support Client once started the remote connection.

- **Tools Bar (Tabbed)**
- **Session Bar**
- **System Overview**
- **Notes**
- **Incident**
- **Customer Information**
- **Event Log**

2.2.1.3.2 Remote Control

**Remote Control Window**

Available options for remote sessions:

- **Shared View Mode**
  Supporter joins in the remote desktop, with no mouse control. Useful when the remote-user needs to explain a behaviour or show an error message without Technician direct intervention. The Supporter can request mouse control.

- **Shared Control Mode**
  Both, Supporter and Supportee, have Desktop view and mouse control.

- **Exclusive Mode**
  The Supporter needs to log in and closes the current user's session, if any.
Each of this options can be optimized by selecting High Color View, Show Wallpaper, and Smart Sizing attributes:

- **High Color (16 bit)**
  Gives better fidelity and image quality, but can slow down the connection speed.

- **Enable Wallpaper**
  Shows the remote desktop wallpaper's. This option is not recommended unless both ends have broadband and high speed transfer rate.

- **Smart Sizing (checked by default)**
  Enlarges or reduces the remote screen to match the local, allowing the Supporter to work better.
2.2.1.3.2.1 Remote Session

**Remote Control Session**

During a Remote Control Session, the Supporter will have the Tabbed Bar and the Main Connection Menu on the top of the screen.

![Remote Control Session](image)

**Main Connection Menu**

This menu contains the following buttons:

- **Disconnect**
  Terminates the Remote Control session, without closing the main connection.

- **Pause**
  Pauses the data transmission.

- **Mouse Control**
  Requests mouse control.
**Send Keys**
Sends keystrokes to the remote PC:
- Ctrl+Alt+Del
- Ctrl+ESC (Start Menu)
- Set Alt-Key Down
- Set Alt-Key UP
- Set Ctrl-Key Down
- Set Ctrl-Key Up

**Select App**
Select one of the applications currently running to

**Set 256**
Reduces color quality on slow internet connections.

**Show Wallpaper**
Shows the remote PC wallpaper. This might lower your connection speed.

**Smart Sizing**
Resizes the remote screen to fit yours.

**Full Screen**
Maximizes the remote PC screen to fit the local monitor.

---

2.2.1.3.3 **File Transfer**

**File Transfer Window**
Transfer files from your local PC to the remote one or vice versa. The left half of the window shows your PC, while the right side shows the remote drives and folders.
Main Menu

There are three menus on this window:

**Local Menu**

This menu contains the following buttons:

- **Up One Level**
  Goes one level up.

- **Create Folder**
  Creates a new folder on the current directory.

**Remote Menu**
This menu contains the following buttons:

**Disconnect**
Terminates the File Sharing session, without closing the main connection.

**Home**
Goes back to the root view.

**Up One Level**
Goes one level up.

**Refresh**
Reloads the view.

**Create Folder**
Creates a new folder on the current directory.

**Delete**
Deletes the folder or file selected. This action cannot be undone.

**Transfer Menu**

This menu contains the following buttons:

Select a file or folder and press the blue arrow to transfer. Making a right click over the file selected will show up the contextual menu with more options.

2.2.1.3.4 Remote Shell

**Remote Shell Window**

This Tool can be used to remotely execute command line tools and scripts.
SupportSmith v2.0

Main Menu

This menu contains the following buttons:

- **Disconnect**
  Terminates the Remote Shell session, without closing the main connection.

- **Copy**
  Copies the current selection.

- **Paste**
  Pastes text from clipboard.

- **Print**
  Prints the screen.

2.2.1.3.5 System Information

**System Information Window**

This tool gets data from the system via several paths (e.g., process monitors, internal database), and after some processing, and presents it in different tabs.
The data gathered is not stored in the incident file, only a brief resume (the System Overview) will be saved for further analysis.

Detailed view of the tabs bar:

2.2.1.4 Incident Viewer

**Working with Incident Files**

Open to read or edit the Incident File created during the Remote Support Session. Click the Browse button to find and select the files you saved.

All the Supporter, Customer & System information will be available for further consults, as well as any Supporter Notes and the event log.
The folder where Incident Files will be saved was defined by default at:
C:\Documents and Settings\User\My Documents\Cybele Software\SupportSmith v2\You can change this path from the Support Manager’s Settings window.

2.2.2 Settings

This Section describes the Settings window and indicates you how to configure the SupportSmith’s Support Tools properly.

- Connection
- User Information
- Incidents
- General

2.2.2.1 Connection

Connection Settings
**Proxy Settings**

**Use Proxy Server:**
Check this option to use a Proxy Server. From the Proxy Settings box you can either use Internet Explorer Proxy settings or define your own.

**Communication Server**

Click on Settings button to enter the SupportSmith Server communication parameters:

- **Address:** Enter the server IP Address or DNS Name.
- **Port:** Enter the server port to connect to.
- **Username:** Enter the username required for a proper authentication. Include the domain name whether necessary.
- **Password:** Enter the password required for a proper authentication.

⚠️ There's a grayed out option for Public Server. At this time we are not running a Public Server for SupportSmith. However, this option might be available in the future. If you require more information regarding this matter please contact us.
**License Information**

**E-Mail**  
Enter the email associated to your Company.

**Company ID**  
Enter the ID assigned to your Company. It consists on 4 groups of 8 characters each (letters and numbers), separated by a dash (-). Its format will be: 12345678-12345678-12345678-12345678

**2.2.2.2 User Information**

**Technician's Profile**

This profile will be saved within the SupportSmith Incident file:
It is recommended to be filled out with the Supporter's contact information:

- **Organization Unit**
- **Full Name**
- **E-Mail**
- **Phone**

### 2.2.2.3 Incidents

**Incidents Settings**
Save Options

Folder
Select the folder where the Incidents will be saved.

Save Incident Automatically
Check this option to save the incidents automatically at the end of the Support Session.

Custom Fields
Create custom fields to archive extra information.

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
<th>Type</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>FollowUpDay</td>
<td>Day to follow up</td>
<td>Calendar</td>
<td></td>
</tr>
<tr>
<td>BrowsersInst.</td>
<td>Browsers Installed</td>
<td>ComboBox</td>
<td>IE</td>
</tr>
</tbody>
</table>

Add a Custom Field.
Removes the selected Custom Field.
Moves the selected Custom Field one row down.
Moves the selected Custom Field one row up.

2.2.2.3.1 How to Add a New Field

Custom Fields
Create custom fields to record extra information inside the Ticket Incident.

1. Go to the Support Manager Settings:
   From Main Menu: File > Settings
   From the Start Menu: Start > Programs > SupportSmith v2 > Supporter Manager

2. Add a Custom Field.

3. Click on the Field's Name to edit it.

4. Click on the Field's Label to edit it. The Label will be shown at the Ticket interface.
5. Click on the Field’s Type to edit it.

6. If you created a Custom Field that requires Values (ComboBox), click on the Value column to enter them.

7. The fields you created will be added to the Ticket Interface above the Note’s field.
2.2.2.4 General

**Supporter Module Settings**

**Run Manager at Start Up**
Check this option to run the SupportSmith Manager at Windows Start Up.

**Chat Preferences**

**Do not save Chat logs**
Select this option if you prefer not to save the Chat logs.

**Save in**
Define the folder where all chats will be saved.

**Ask**
Select Ask to be always presented with a "Save in..." window.

**Sound Notification**
Whenever a Customer starts a Support Request, the system will play the Notify.wav file to make a Sound Notification. Browse to select another .wav file.

**Language**
There are two Language options for the Support Manager interface, English and Spanish. To change the Language interface, select the option and click Apply.
2.3 Pre-Installed Agents

2.3.1 User Options

**Contextual Menu**

The contextual menu for SupportSmith Agent options can be accessed from the Tray bar icon.

![Contextual Menu Icon](image)

**Important:** Some of these options may have been disabled by your System Administrator.

- **Work with a Colleague**
  SupportSmith enables Application Sharing between all Pre-Installed Agents. Two Colleagues can work together on the same application or assist each other.

- **Get Technical Support**
  Request assistance to the Support personnel with one click.

- **Chat with a Technician**
  Get a quick answer for your inquiries chatting with a Technician.

2.3.1.1 How to Work with a Colleague

1. Make one right or left click over the SupportSmith Agent icon on the Tray Bar to launch the menu.

![Contextual Menu](image)

2. On the menu, make a click on the option that says "Work with a Colleague".
3. Make one click to select from the list the application you want to share. The application to be shared must be already open. If the application is not listed, open it and then click on the Refresh icon to reload the list.

4. Write the username of the Colleague you wish to share the application with. This Colleague must be running SupportSmith's Pre-Installed Agent as well. While your colleague's is logged on the same domain as you, no domain name is required; otherwise it must be entered as DOMAIN\Username.

5. Once you have selected the application and the user, click on 'Share!'. SupportSmith will show you the progress on your request.

6. Your Colleague must accept the invitation.

7. If your Colleague accepts the invitation, you will be able to see the application he/she wanted to share.
2.3.1.2 How to Request Support

1. Make one right or left click over the SupportSmith Agent icon on the Tray Bar to launch the menu.

2. Click on the option "Get Technical Support". This will launch the Remote Assistance window. Complete the required information (if any) and press the Get Help button.
3. Once the connection is established, keep your Ticket Number for future reference.

4. The Supporter will see your incoming request on the Support Manager window, and will take care of your Support Request.

5. Once the Supporter starts the session, on the lower right corner of your screen you will see the Session Manager window, with a button to start a chat with your Supporter and a button to close the session.

6. This is how the SupportSmith's Support Client window looks like during a remote support session (picture minimized):
2.3.1.3 How to Chat with a Technician

1. Make one right or left click over the SupportSmith Agent icon on the Tray Bar to launch the menu.

2. Click on the option that says "Chat with a Technician.

3. Use the chat window to talk to the Supporter you selected. Type in the text and press the 'Send' button. Your chat logs will be saved according to the preferences you set by the Administrator.
2.3.2 Settings

SupportSmith v2.0: Pre-Installed Agent Settings

Pre-Installed Support Agents allows Technicians to have administrative/unattended access to the remote PC, plus benefiting from all Administrative Tools available to this scenario.

Pre-installed agents enable:

- Administrative/unattended Remote Access
- Real time Status Monitoring.
- Working with a Colleague
- Request Technical Support

Agent Settings

Any Agent configuration can be managed from the Agent Settings window. Go to Start, Programs, SupportSmith v2 and launch the SupportSmith Agent Manager:
2.3.2.1 Status

Connectivity Status

The SupportSmith Agent enables Remote Access to your computer. This screen shows its connectivity status. When your SupportSmith Agent is enabled and connected, you will see a brief note about the connection host, port and encryption type.

Disconnect/Reconnect SupportSmith Agent by clicking on the green check mark.

⚠️ If the connectivity status window shows an error, verify the Communication Server settings and License information entered under the Connection tab.

2.3.2.2 Connection

Connection Settings
Connection Settings

Use Proxy Server:
Check this option to use a Proxy. From the Proxy Settings box you can either maintain Internet Explorer Proxy settings or define your own.

Accept Incoming LAN Connections:
This option is checked by default. Uncheck to deny access to incoming LAN connections.

SupportSmith Server

Click on Settings to enter the SupportSmith Server Settings:

Address: Enter the server's host.
Port: Define which port should be used.
Username: Enter the username required to log in.
Password: Enter the password required to log in.

There's a grayed out option for Public Server. At this time we are not running a Public Server for SupportSmith. However, this option might be available in the future. If you require more information regarding this matter please contact us.

License Information

E-Mail
Enter the email associated to your Company.

Company ID
Enter the ID assigned to your Company. It consists on 4 groups of 8
Components 45

characters each (letters and numbers), separated by a dash (-). Its format will be: 12345678-12345678-12345678-12345678

2.3.2.3 Access Control

Access Settings

Valid Credentials

Windows Logon
This option will be selected by default. To configure the Access permissions to this computer click on Settings. Select Local/Global Groups or Users within those available to have granted access to your PC. When attempting to connect to this computer, they will be required to enter domain, user and password.

Password
Assign a Password to this computer. Anyone who tries to access it using SupportSmith will be required to enter this password you specified. This password can be changed as many times as you wish.
Keep your safety! Do not choose the same password you use for other private information (Home Banking, eMail Accounts, etc.), specially if many people has rights to access your computer.

**Access to External Resources**

**Allow remote access to the following resources**
Check this option to list all the resources (ip:port) you need to share.
For example:
- 192.168.0.10:23
- 10.10.1.*:3899
- 10.10.2.3:*
- 192.168.1.[114-255]:[80,443]

2.3.2.4 **User Information**

**User Profile**

The following information will be shown every time someone requests assistance through this Agent, along with the System Overview.

This profile will be also saved within the SupportSmith incident file, as seen below:
It is recommended to be filled out with the main PC user's contact information:

- **Company Name**
- **Full Name**
- **E-Mail**
- **Phone**

There is a field for Notes that can be used to include some extra information regarding the PC, like who uses it, it's physical location, etc.

### 2.3.2.5 General

**Other General Configuration Settings**

![Agent Settings](image)

**Language**

There are two Language options for the Agent interface, English and Spanish. To change the Language interface, select the option and click Apply.
**Chat Preferences**

*Do not save Chat logs*
Select this option if you prefer not to save the Chat logs.

*Save in*
Define the folder where all chats will be saved.

*Ask*
Select Ask to be always presented with a “Save in...” window.

**Supporter Preferences**

*Root Assistance Group*
Assign an Assistance Group to the Agent.

*Display Assistance Group List*
Check this box so the 'Get Support' window will show the list of Assistance Groups.

*Display Supporter List*
Check this box so the 'Get Support' window will show the list of Supporters.

### 2.3.2.6 Admin Access

**Admin Access Settings**
Protected Administrative-Options Settings

Password
To lock the Access to this settings check the option and enter an administrative password. Checking this option and adding a password will hide Admin tabs on this menu.
To show all tabs the Admin password must be entered.

Save on this machine
Check this option to save the Admin password information locally.

2.4 On-Demand Agent Creator

2.4.1 Settings

How to create you own On-Demand Agents
Pick up your preferred options and enter your SupportSmith Server settings to
create your own On-Demand Agents. The company logo, required fields, texts and other settings can be easily configured.

**Customize your On-Demand Agents**
- User Interface
- Communication Server
- Any text string
- Miscellaneous options for the Agent
- General options for the Creator
2.4.1.1 User Interface

User Interface Settings

Logo File
Click on the Add button to browse the PC for a Logo file. The Logo file could be GIF, JPG or PNG.

Background
Change the background color to match your Company Logo or Corporate Image.

Customer Information
The On-Demand Agent might ask for Company Name, Full Name, E-Mail, Phone and Notes. This information might be set as mandatory to start the Support Request.
This is how an On-Demand Agent looks like when all the fields are required:
2.4.1.2 Misc

Miscellaneous Settings

![SupportSmith v2.0 - On-Demand Agent Creator](image)

- **Company:** Cybele Software
- **Name:** Claire
- **E-Mail:** claire@cybelesoft.com
- **Phone:** 302-892-9625
- **Notes:** Needing assistance with printer

Press "Get Help" button to initiate the Support process.
Options

Auto-Start
Makes the On-Demand Agent to start the support request automatically when it is run.

Open Chat
Opens the Chat box as soon as the session starts.

Auto-Accept Permission Dialogs
Auto-accept any permission-request prompt to view desktop, file transfer, etc.

Shared Application
Choose a single application to be shared instead of sharing the whole desktop and enter the path here. For example: "Microsoft Excel"

Supporter Selection

Root Group

Allow to choose a supporter group
If there are different support groups, allows the User to choose an specific group to work with.

Allow to choose a specific supporter
Allows the User to choose an specific supporter to work with.

Ticket Format

Prefix
Allows you to create a prefix for the Ticket.

Number of Digits
Select the number of digits.

Suffix
Add a suffix to you Ticket.

Initial Number
The number that will start the count on your Ticket system.

Preview
This box will show the preview of the Ticket format as you work on it.

2.4.1.3 Communications

Communication settings
**Communication Server**

**Address:** Enter the server IP address or DNS name.

**Port:** Enter the server port.

**Username:** Enter the username required for proper authentication.

**Password:** Enter the password required for proper authentication.

**License Information**

**E-Mail**
Enter the email associated to your Company.

**Company ID**
Enter the ID assigned to your Company. It consists on 4 groups of 8 characters each (letters and numbers), separated by a dash (–). Its format will be: 12345678-12345678-12345678-12345678

2.4.1.4 **General**

**General Settings**
**Destination Directory**
Define an already existing destination directory for the On-Demand Agent that will be created.

**Language**
There are two Language options for the On-Demand Agent Creator interface, English and Spanish. To change the Language interface, select the option and click Apply.

2.4.1.5 **Strings**

**Strings Settings**
Quick Setup Guide

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

1. **Install and Configure the SupportSmith Server**
2. **Install and Configure an Agent**
3. **Install Support Tools**
4. **Try the first Support Session**
5. **Install On-Demand Agent Creator**

- **Required Setup files:**
  
  - **Server**
    SupportSmith v2 Server.msi
  
  - **Supporter Tools**
    SupportSmith v2 Suport 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\n  - C:\Documents and Settings\*user*\My Documents\Cybele Software \SupportSmith v2\n
- General System Requirements:
  - Intel Pentium or equivalent processor
  - 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

### 3.1 Install and Configure the SupportSmith Server

Run **SupportSmith v2 Server.msi** setup and proceed with the installation. At finish, start the SupportSmith Server Manager from the Start/Programs menu:

1. **Enter the public host address and port:**
   This is the internet IP or DNS name of your server. It is required for Agents or Support Tools running outside your company.
2. **Add the License File.**

Load the .xml License file we sent you (no matter if it is a trial or a registered license) and save the changes.
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.
3.2 Install and Configure an Agent

Run **SupportSmith v2 Agent.msi** setup and proceed with the installation. At finish, start the Agent Manager from the Start/Programs menu to configure the Connection Settings:

1. **Server**
   Enter the host address and port, along with a valid `DOMAIN\User` and Password.

2. **License information**
   Enter the Email & CompanyID you’ll find on the .txt license file.
3.3 Install Support Tools

Run the Support Manager Setup at the Supporter's PC and proceed with the installation. At finish, start the Support Manager from the Start/Programs menu, this will launch the page to configure the Connection Settings:

1. Server
Enter the host address and port, along with a valid DOMAIN\User and Password.

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

![Connection Settings](image)

3.4 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 Supporter Manager.
   Login to the Support Manager (DOMAIN\User and Password).
2. Select a Computer to start a remote session.

b. Requesting Support from the Pre-Installed Agent's menu at the remote PC.
   1. Make a right click over the Agent's icon at the tray bar.
   2. Click on Get Help.
   3. Go to the Support Manager, open the tab for Customers with opened support requests and start the remote session.

3.5 Install On-Demand Agent Creator

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

1. Create your own On-Demand Agent and run it.
2. Go to the Support Manager, open the tab for Customers with opened support requests and start the remote session.

4 Software Registration

By purchasing SupportSmith v2.0 you will access to technical support, free upgrades and updates and the activation of advanced features in your edition.

We offer Technical Support by e-mail and/or phone, which also includes free updates and upgrades during the covered period and our full commitment to timely fix bugs and problems.

We encourage users to renew the annual maintenance contract in order to be eligible for technical support and product upgrades. The maintenance fee after the first year will still be 20% of the updated price of the purchased product.

If you have any other question, contact us at sales@cybelesoft.com. Our sales representatives will get in touch with you to assist you with your purchase.
4.1 Registering your Trial Version

If you downloaded SupportSmith's Trial version from our web site or a distribution site and you have already purchased a license, you must follow these steps in order to register the product:

1. **Upload the License File to your Server.**
   Load the .xml License file we sent you and save the changes. The right column will show how many Agents, Supporters, Channels, etc. you have.

![License File Upload](image)

2. **Set the License information within the Supporter Settings.**
   Launch the Supporter Settings, and enter the Email & CompanyID (you'll find them on the txt License we provide you) under the Connection Tab.
3. **Set the License information within the Agent Settings.**
Launch the Agent Settings, and enter the Email & CompanyID (you'll find them on the txt License we provide you) under the Connection Tab.

4.2 **How to Place an Order**

There are many ways to order your SupportSmith's licenses:
• Contact us at sales@cybelesoft.com. Let us know about your licensing needs and we will send you an official quotation. Our sales representatives will get in touch with you to assist you with the purchase.

• You can also call us anytime to any of these phone numbers and place the order immediately:

  **Toll Free: 1-866-462-9768**
  Local line: 1-302-892-9625
  Fax: 1-302-295-9995

• You can also contact us through Live Chat by pressing this icon in our website:

![Live Chat Icon]

and immediately have a conversation with a representative without even having to pick up the phone.

There are several payment options, and we also accept Purchase Orders.

When you buy SupportSmith, you will receive a Key to register the Trial version. For instructions on how to register SupportSmith when you purchase a license, see Registering your Trial Version.

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5 Obtaining Technical Support

Cybele's goal is to offer high quality products and services. Using registered Cybele Software's applications not only allows you to receive free product upgrades and updates but also the certainty that you will have our team of experienced developers and technical support representatives working hard to assist you with any issue, thus making the product much more accessible in any situation.

We are here to help you out from monday to friday 9 a.m. to 5 p.m. eastern time on the phone numbers:

  **Toll Free: 1-866-462-9768**
  Local line: 1-302-892-9625
  Fax: 1-302-295-9995

If you make your call outside this hour range, you can leave a message and we will get back to you.

You can send us an email to support@cybelesoft.com and we will write you back timely. You can also contact us through Live Chat by pressing this icon in our website:
and immediately have a conversation with a representative without even having to pick up
the phone.