Easy Assist

Getting Started Guide

InterCall

Information Hotline
0871 7000 170
+44 (0)1452 546742
conferencing@intercalleurope.com

Reservations
0870 043 4167
+44 (0)1452 553456
resv@intercalleurope.com

www.intercalleurope.com

Microsoft® Easy Assist is the remote support solution available through Microsoft® Office Live Meeting 2007 offered by InterCall. First time users can log in to Microsoft Office Live Meeting 2007 Manager as a meeting organiser to create an Easy Assist support session.

After Easy Assist is installed on your computer, you can use the Easy Assist Launchpad to start a remote support session directly from your computer, rather than logging into Live Meeting Manager. The Easy Assist Launchpad allows a support person to create and join a support session from his computer and send an invitation to a user to also join the session.

This Easy Assist guide instructs you how to:

- quickly join an Easy Assist session
- create sessions using the Easy Assist Launchpad
- share the desktop
- request control of another computer

There's also an introduction to features of the Easy Assist client, including private chat, file upload, and file download. For more details and advanced topics, see the online Help, which is accessible from within the Easy Assist client and the Easy Assist Launchpad.

Attending a Session

When you receive an e-mail invitation to join an Easy Assist session, you can easily join the session by clicking the link in the invitation.

Note: *Easy Assist automatically determines whether you need to install the support client and provides installation links, if necessary.*

When you are connected to a session, you have several ways that you can view the session and participate. This section talks about the following tasks:

- Joining a session
- Requesting control of a user's desktop
- Using the Easy Assist client

JOINING A SESSION

You can join a session directly from the e-mail invitation. The invitation contains a **Join Session** link that automatically starts the Microsoft Easy Assist client and connects you to the session. If this is the first time you are joining a session, you will be prompted to install the Easy Assist client before you can join.

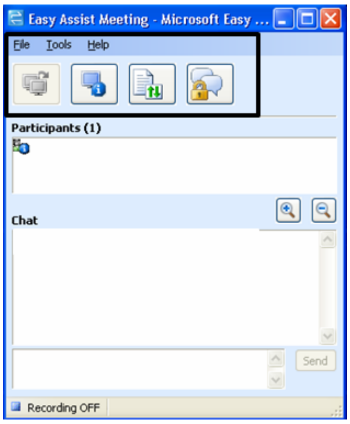
To join a meeting:

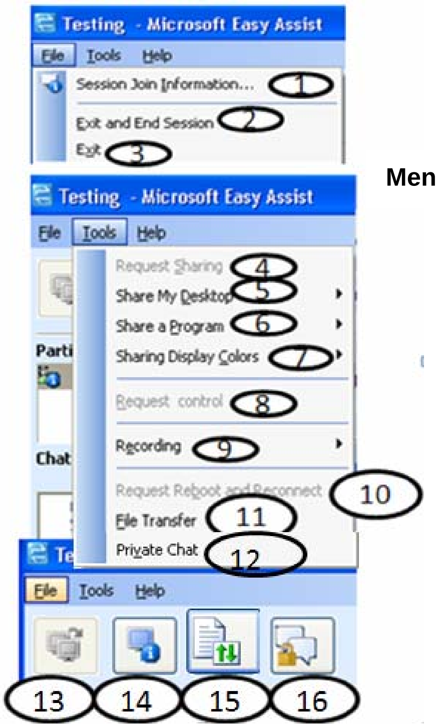
1. In your e-mail Inbox, open the meeting invitation.
2. Follow the instructions to join the session, as shown below. Microsoft Easy Assist automatically opens and joins you to the session. If you do not have the client installed on your computer, you will be prompted to install the Easy Assist client.

Last modified on: 09/03/2009

USING THE MICROSOFT EASY ASSIST CLIENT

The topmost element in the Microsoft Easy Assist client is the Menu Bar and icons located below the menu bar, as shown below.





Menu Bar menu items and icons

Label	Menu Item	Function
1 and 14	Session Join Information	Shows session details, including session subject and join URL.
2	Exit and End Session	Shows session details, including session subject and join URL.
3	Exit	You can exit the session
4 and 13	Request Sharing	Support Agents can send a request to share customer's desktop.
5	Share my desktop	Support Agents can share their desktop with other participants in the ses
6	Share a program	Support Agents can select and then share a single program with other participants in the session
7	Sharing Display Colours	During a sharing session, Support Agents can choose a colour display o best performance or best appearance.
8	Request Control	Support Agents can request and then take control of a remote desktop.
9	Recording	Support Agents can start, pause or stop a recording of the session.
10	Request Reboot and Reconnect	Support Agents can request participants to reboot and reconnect to their computer.
11 and 15	File Transfer	You can upload files to a support session, which any user can download
12 and 16	Private Chat with Support Agents	You can chat privately with all other Support Agents in the session.

Interacting During the Session

The Easy Assist client provides a way for the Support Agents to interact with each other. If you want to chat privately with all other support agents in the session, you can use the private chat feature.

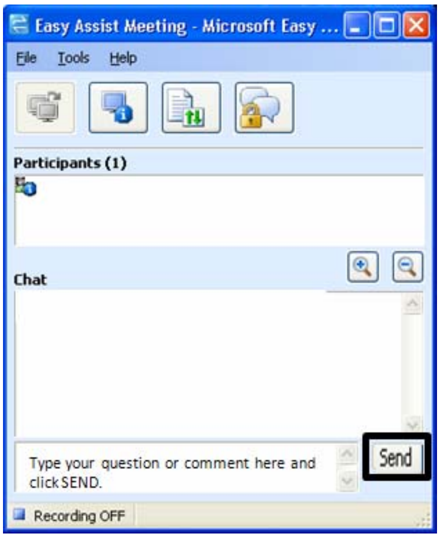
USING PRIVATE CHAT

You can chat with other Support Agents during a session, such as when a Support Agent may have questions for a senior Support Agent.

To Chat Privately with another Support Agent:

1. From the client, click **Private chat with other Support Agents icon**.
2. Type your comment or question in the text box, and then click **Send.** The chat between you and the Support Agent appears in the box at the top.

To Chat with a Customer:



In the Chat text box at the bottom, type your comment or question, and click Send. The chat between you and the customer appears at the top.

Creating a Session

There are two methods for creating a session. You can use the Easy Assist Launchpad or you can use the online Microsoft Office Live Meeting Manager. You can also join the last session you created using the Launchpad. This section talks about the following tasks:

+ Configure the Easy Assist Launchpad
+ Creating a session using the Live Meeting Manager
+ Joining the Last Session

Note: *To create a session, you must have a Live Meeting service meeting organiser account. Your administrator will give you the account information you need to configure Live Meeting.*

CREATING A SESSION

There are two methods for creating sessions. It is recommended that you use the Easy Assist Launchpad to create sessions. The Launchpad allows you to create sessions directly from your computer. You can also create sessions by logging in to Live Meeting Manager. See the procedure **To use Microsoft Office Live Meeting Manager to create a session**, later in this guide.

To configure the Easy Assist Launchpad:

1. Install the Easy Assist Launchpad on your computer according to your administrator's instructions.
2. Click the **Start** menu, **All Programs**, **Microsoft Easy Assist**, and then click **Microsoft Easy Assist Launchpad**.
3. In the **User Account** dialog box, under **Live Meeting Service**, do one of the following:
   - In the **URL** text box, type the URL of your Easy Assist portal.

   Or
   - In the **URL** text box, type the URL of your Live Meeting conference center. Then select the **Use the following user name and password to access my account** check box and, in the text boxes provided, type your logon information.
   - In the **Display Name** text box, type your preferred display name.
4. To verify your login information, click **Test Connection**.
5. Click **OK**.

To create a session using the Launchpad:

1. To create a session using the Launchpad, do one of the following:
   - Double-click on the **Microsoft Easy Assist** icon in your start up menu to bring up the **Create Session** dialog box.

     or
   - Click the Start menu, click All Programs, Microsoft Easy Assist, and then click Microsoft Easy Assist Launchpad.
2. In the Case ID text box, type a description of your session.

Note: *It is recommended that you enter the trouble ticket case ID number, incident number, or ticket number as the* ***Case ID****.*

3. To set **Session Option**, click the **Session Options** icon, as shown below. In the **Number of Participants** text box, enter the maximum number of people that you expect to attend the session.

Session Options icon

4. When the session ends, a summary report of the session containing basic information, such as the session time and duration, attendance report, files uploaded and so forth is sent to the e-mail address specified in the **Summary e-mail address** text box.
5. To allow entry to individuals who have the meeting ID without requiring entry code, select **Customers can join the session without an entry code**. If you require an entry code, DO NOT select the check box.
6. Click **OK**, to save the **Session Options**.
7. Click Create Session, to create the session.
8. From the **Session Join Information** dialog box, do the following:
   - Click **Customer Invitation** to send the invitation using your e-mail client.

To join the last session

You can join your last created Easy Assist session using the **Join Last Session** option in the Easy Assist Launchpad.

1. In the system tray, right click on the **Microsoft Easy Assist Launchpad** icon and then select **Join Last Created Session**.
2. In the **Join Session** dialog box, type in your **Display Name**, and click **Join**.

Sharing in a Session

The Microsoft Easy Assist client has a streamlined design that puts the focus on what you are troubleshooting. There are many ways you can share and request control of a customer's desktop. This section talks about the following tasks:

- Request Sharing
- Request Control
- Share My Desktop or a Program

SHARING DURING THE SESSION

During sessions, a support person can request desktop sharing and then take control of a participant's desktop, or they can share their own desktop.

To request sharing and then take control of the desktop

1. **Click Tools**, click **Request Sharing**.
2. A **Waiting for response from "user name"…** dialog box will appear. You will be able to view the participant's deskto program, when the participant clicks **OK** to **Share Desktop** or **Share a Program**.
3. To take control of the remote desktop, click **Tools**, click **Request Control**.
4. On the **You have been given control of the sharing session** dialog box, click **OK** to take control of the desktop shai session.

UPLOADING CONTENT

During a session, you can upload content for users to download. Live Meeting scans the file for viruses as the file is uploaded.

To upload content:

1. From the client, click the **Open File Transfer** icon.
2. Click **Upload**. If you do not see the file you are looking for, use the **Files of Type** drop-down list to select the file type you want to add.
3. Navigate to the file on your computer, and then click **Open**.
4. Repeat the above steps for each file you want to add. When you are finished, close the **File Transfer** dialog box.

To download content:

1. Click the **Open File Transfer** icon.
2. Select the files you want to download, and then click **Download**.
3. Navigate to the location on your computer where you want to save the file.
4. Click **OK**.

REQUESTING A REBOOT AND RECONNECT

During a troubleshooting session, you may require the customer to restart their computer. You can easily request this by **Requesting a Reboot and Reconnect**.

To Request a Reboot and Reconnect:

1. Click **Tools**, click **Request Reboot and Reconnect**.
2. In the **You are about to send a reboot request to customer. Click OK to continue** dialog box, click **OK**.

Recording a Session

During a session, you can enable recording and save the recording to your Live Meeting service conference center.

To record a meeting:

1. From the client, click **Tools**, click **Record**, and then click **Start**.
2. In the **This session is being recorded** dialog box, click **OK**.
3. To save your recording, click **Tools**, click **Stop**, select **Save Recording**, and then click **OK**.

To view a recording that is saved to your Live Meeting conference center:

1. Log on to **Live Meeting Manager**.
2. On the **My Home** page, under **View**, click **Recordings**.
3. Under **View recording**, in the **ID** and **Recording Key** boxes, enter the recording ID and the recording key, respectively default, the recording key is the same as the meeting key. If the meeting did not require a meeting key, then by default recording key is required.

APPENDIX A: TO USE MICROSOFT OFFICE LIVE MEETING MANAGER TO CREATE AN EASY ASSIST SESSION

Alternatively, you can the Log in the Live Meeting Manager to create an Easy Assist session.

To use Microsoft Office Live Meeting Manager to create a session:

1. Open a Web browser and type the URL for your Microsoft Office Live Meeting service.
2. If necessary, enter your user login and password.
3. Click **Login to Live Meeting**.
4. Under **Easy Assist**, click **Create Session**.
5. In the **Subject** text box, type a description of your session.
6. When the session ends, a summary report of the session containing basic information, such as the session time and duration, attendance report, files uploaded and so on, is sent to the e-mail address specified in the **Summary E-mail Address** text box.
7. Click **Session Options** to configure settings that ensure that the session features suit your needs. You can configure tl options for your session by using **Meeting Options**.
8. In the navigation pane of the **Session Options** dialog box, click **Session Details**.
   - In the **Session ID** box, enter an ID that users need to join your session.
   - In the **Bill to Code** box, enter the billing code associated with your use of the Live Meeting service within your organization. In the **Number of participants** box, enter the maximum number of people that you expect to attend the session.
   - When the session ends, a summary report of the session containing basic information, such as the session time and duration, attendance report, files uploaded and so on is sent to the e-mail address specified in the **Summary e-mail address** text box.
9. In the navigation pane of the **Session Options** dialog box, click **Entry Control, Support Agent**.
   - Under **Entry Control, Support Agent**, do one of the following:
     - If you want Live Meeting Manager to automatically generate an entry key for your session, select the **Use a system generated Entry Code** radio button.
     - To create your own entry key, type the key in the **Use this Entry Key** text box.
10. In the navigation pane of the **Session Options** dialog box, click **Entry Control, Customer**.
    - Under **Entry Control, Customer**, do one of the following:
      - If you want Live Meeting Manager to automatically generate an entry key for your session, select the **Use a system generated Entry Code** radio button. To create your own entry key, type the key in the **Use this Entry Key** text box.
      - To allow entry as a customer to individuals who have the Case ID without requiring an entry code, click **Free Entry.**
11. To save your **Session Options**, click **OK**. Or, click **Cancel**, to return to the previous page.
12. Click **Save**, to create your session.

__Note:__ From the __Session Details__ page, you can copy the __Presenter (Support Agent) URL__ or __Attendee (Customer) URL__, and send it using your own e-mail program.

InterCall

Frequently Asked Questions

If you are new to Easy Assist, you may have the following questions.

WHAT IS MICROSOFT EASY ASSIST?

Microsoft Easy Assist is a remote support solution that is available through the Microsoft Office Live Meeting 2007 service. First time users can log in to Microsoft Office Live Meeting 2007 Manager as a meeting organiser to create an Easy Assist support session. After Easy Assist is installed on your computer, you can use the Easy Assist Launchpad to start a remote support session directly from your computer, rather than logging into Live Meeting Manager. The Easy Assist Launchpad allows a support person to create and join a support session from his computer and send an invitation to a user to also join the session.

WHO SHOULD USE EASY ASSIST?

Computer users, particularly users without much technical expertise, often have configuration problems or usage questions that are difficult for a support person to diagnose and fix over the phone. Easy Assist provides a way for users to get the help they need and makes it easier for Help desks to assist their users.

WHAT DO I NEED TO DO BEFORE I START?

If you simply want to join a session that someone else invites you to, you can click **Join session** in the e-mail invitation. Easy Assist prompts you if any software installation is needed. If you want to create sessions using the Easy Assist Launchpad, you first need to install the Easy Assist Launchpad and then configure your account information. See the procedure, **To configure the Easy Assist Launchpad**, later in this guide.

HOW DO I KNOW IF I HAVE THE EASY ASSIST LAUNCHPAD INSTALLED?

You can determine if the Easy Assist Launchpad is installed on your computer by clicking **Start**, then **All Programs,** and then looking in the program list for **Microsoft Easy Assist Launchpad**.

WHY ARE SOME OF THE SESSION OPTIONS, SUCH AS FILE TRANSFER AND REQUEST CONTROL, DISABLED?

Because Easy Assist is a part of Live Meeting, your Live Meeting administrator may have disabled these features for your Live Meeting organiser account or your entire Live Meeting conference center. For more information, contact your Live Meeting administrator.