

## Best practice: Netviewer Remote Support Solutions

This document describes the optimal usage of Netviewer software solutions within support centres.

It is intended for persons responsible for best practice software integration to enhance the existing workflow for maximum efficiency and data security.

### Demands on remote support software tools

Remote support tools are used within support centres to establish remote access to external PCs, servers or other IT infrastructure. Remote support is used for the analysis and elimination of technical problems respectively for maintenance reasons (e.g. software updates). The IT infrastructure either belongs to internal departments or to external customers. Especially with external customers it's essential that the remote management solution is perfectly integrated in the general work flow of the support centre.

It's a major requirement that only the responsible support agents have access to selected customers. Also the configuration of individual functions per employee (1<sup>st</sup> /2<sup>nd</sup> /3<sup>rd</sup> Level) should be covered by the software.

Another important demand concerning auditing acceptability is the capability to record the conducted steps during a remote session.

Some requirements for a secure remote support can be covered on participant's side only. One example is a disclaimer to be acknowledged by the customer before starting a remote session.

The Netviewer software solution provides a large number of features and functions for smooth and secure remote support access. The following chapters will highlight this in detail.

### Features on support centre side

#### Access only for authorized employees

The general access to the Netviewer software can be allowed by user name and password. The login data is stored on the Netviewer servers.

Alternatively integration into the Active Directory of the support centre is possible. This integration allows a secure Single-Sign-On to all Netviewer applications. The advantage of an integration is the centralized user administration. Misusage of the software outside of the support centre is not possible. If an employee has left the company the authorizations can be deleted within the central Active Directory. Active Directory integration is possible only with a Netviewer Enterprise Server on support centre premises.

The best possible solution is the integration of the Netviewer software into the ticket system of the support centre. With such integration the agent can start a Netviewer session directly out of the support portal without the need of additional authentication. The following figure shows an example of such an integration.

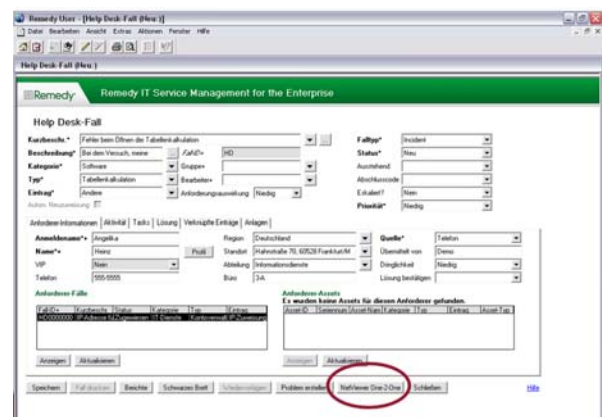


Figure 1

Another security mechanism is the restriction of the IP address subnet where the Netviewer consultant program can be started from. This feature ensures that initiation of the remote support software is possible only from the internal workstations.

#### Coverage of different support levels

With the Netviewer software solutions different support levels can be covered very easily. For each employee only specific features and functions can be provided. For example the 1<sup>st</sup> level agents should not use features like 'remote control' or 'file transfer' but the 2<sup>nd</sup> level agents can.

When using Netviewer Meet multiple employees can work together on one support case. The scenario could be as follows: If an agent needs

help during a remote session he can add a colleague to the Netviewer session and they can work together to solve the problem. This workflow is also a perfect way for internal advanced training, because employees can improve their expertise directly during a real support case („Training on the job“).

### **No change of direction of viewing**

With the standard configuration of the Netviewer software both session partners are able to change the direction of viewing. In a support centre scenario this feature can be deactivated, so only the help desk agent can view on the participants PC but not vice versa. This ensures that the participant can never get access to internal information of the support centre.

### **Ability to prove the accomplished steps**

An essential feature for auditing acceptance is the recording of the accomplished steps during a support session.

With the Netviewer recording functionality the complete support session can be recorded and thus proven at a later date. This functionality covers the complete recording of the desktop, including web cam and VoIP content during a Netviewer session. The information is recorded as a video file in the proprietary Netviewer .nvl format and can therefore not be manipulated.

The recordings can be stored on a centralized file server, so only authorized employees can have access to it.

The recordings of particular support cases can also be used as “best practice” examples during internal trainings, team or feedback meetings.

### **Netviewer server on support centre premises**

The Netviewer remote services can be operated either by the Netviewer SaaS (Software-as-a-Service) server infrastructure or by Netviewer servers on support centre premises.

With a Netviewer server on support centre premises a complete integration into the IT architecture of the help desk is possible. All internal policies concerning security, usability and availability can also be applied to the remote support tool.

## **Features on participant side**

### **Disclaimer**

By using a disclaimer before starting a Netviewer session the support centre can communicate a liability exclusion to the customer. This disclaimer can be installed on the website of the help desk centres and has to be confirmed by the customer. The execution of the Netviewer participant program is available only after confirmation of the legal disclaimer.

### **Approval for specific functions**

With Netviewer Support and Netviewer Meet both session partners (consultant / moderator and participant) have to start the Netviewer client program. There is no remote support access possible without an active confirmation on the participant side. The participant can close the session at any time by ending the client program. The participant consequently has the complete control for starting and ending the session.

In addition the participant must confirm the session before the Netviewer software enables the participants screen for remote access. In the Application selection tray the participant can determine which applications and elements of the screen the session partner will see.

To enable the remote control functionality by the support agent the participant must also explicitly approve. Pressing the security key (by default [F11]), immediately revokes the remote control.

### **Indirect file transfer**

The asynchronous file transfer is always handled through the Netviewer servers. The support agent can upload a file to the Netviewer server only; the download to the client PC must be accomplished by the participants. For this reason the file transfer is always under control of the participant.

### **Corporate Identity (CI) adaptation**

The Netviewer software can be adapted to the corporate identity of the particular support centre. This helps the customer to identify the help desk that has established the remote session.

The following figure shows an example of a CI adaptation.



Figure 2

### Ability to review the accomplished steps

The recording functionality can be activated on help desk and on participant side. If 'participant side recording' is configured, the external session partner is also able to review the accomplished steps later on.

### Summary

With Netviewer Support and Meet a number of important features is available to secure a remote support scenario:

- Login with user name and password
- Restriction of the IP address subnet
- Coverage of different support levels
- Multiple employees can work together on one support case (with Netviewer Meet)
- Complete recording of the desktop, including web cam and VoIP content
- Using a disclaimer to communicate liability exclusion to the customer
- Approval for specific functions necessary
- Indirect file transfer through the Netviewer servers
- Corporate identity adaptation for better brand recognition

With a Netviewer server on support centre premises internal security, usability and availability policies can be covered. In addition, the following features are available:

- Active Directory integration for centralized user administration
- Portal integration for smooth workflow

---

Version 1.2 - September 2008

© 2008 Netviewer AG. Netviewer Support, Meet, Admin, Enterprise Server, Standard Server, and the Netviewer Logo are registered trademarks of Netviewer. All rights reserved. All other trademarks are the property of their respective owners.