Remote Service Manager

Installation & Configuration Guide

TABLE OF CONTENTS

OVERVIEW	3
SYSTEM REQUIREMENTS	3
Server Requirements Client Requirements	3
NAMED USER LICENSING AND SUPPORT	4
INSTALLING THE APPLICATION	5
ENABLING THE EMAILING FUNCTIONALITY IN REMOTE SERVICE MANAGER	12
INTERNET INFORMATION SERVICES (IIS) 7	12

Overview

Remote Service Manager (RSM) is a web-based application that allows managers to leverage the real-time information in ECi e-automate® to maximize the efficiency and effectiveness of their teams in the field.

For purposes of definitions, the use of the word Manager used in this guide may also refer to a supervisor, team lead, or other person performing the duties of directing techs in the servicing of equipment. Remote Service Manager may also be referred to as RSM in this guide.

Since RSM is a web-based application, RSM is easily installed on your present RemoteTech Server. Even if you are not currently a RemoteTech user, RSM can be installed on a web server that connects to e-automate. There is not a dependency on RemoteTech for you to enjoy the benefits of RSM. In either case, RSM is added as an application to your existing Internet Information Server (IIS) environment.

System Requirements

Remote Service Managertm (RSM) is a web application that is installed on your company's web server which in turn connects via TCP/IP to your ECi e-automate®server. RSM is accessed via a web browser by your managers. Browsers on such devices as a Laptop, iPhone, iPad, Android Smartphone, and Android Tablet may be used. Using a browser removes the need to install an "app" on the mobile device. The specifications below are guidelines to assist you with setting up the RSM Server.

RSM does not have a dependency on RemoteTech being in use.

We strongly recommend, for security purposes that the RSM software be installed on a separate server and not on your ECi e-automate® server. If your ECi e-automate® environment includes add-on products from Digital Gateway such as e-infotm or RemoteTech, RSM may be installed on that same server. As is the case with RemoteTech, RSM connects directly with the ECi e-automate® database. SQL Server is not required to be installed on the web server for RSM.

Digital Gateway recommends that you work with a network professional that has Internet Information Server (IIS) skills to meet the server and network requirements and assist with the installation.

Server Requirements

- IIS 6+ (IIS 7+ preferred) and .NET 4.0
- e-automate 7.6 or higher.
- The e-automate server must be accessible by the RSM Server via TCP/IP.
- The e-automate server must be SQL Server 2005 or higher.
- SQL server is not required to be installed on the RSM Server.
- Managers must be able to access the RSM via the Internet.

Client Requirements

- The following are commonly used devices. All devices access RSM via a <u>browser and require an</u> <u>internet connect via WiFi or cellular service.</u>
- Smart Phone (iPhone, Android).
- Tablet (iPad, Android).
- Computer Workstation or Laptop.
- 1GB data plans are recommended.

Named User Licensing and Support

Remote Service Manager is licensed as a named user subscription. Continued use of RSM is contingent on payment of the monthly or annual billing. Technical Support for RSM is included as part of the customer's support plan currently in effect with DGI. Training is available via monthly videos and webinars. Please contact eacustomercare@ecisolutions.com for support or installation assistance.

The RSM license is bundled with the RemoteTech license. If you are a RemoteTech user, the license will usually be automatically pushed to RSM. If you are not a RemoteTech user, you will need to activate your server.

€	Administration	*
		۶
RSM 14.1		
Application Revision	00012	
Database Revision	00012	
Configuration		

To activate your server, go to the licensing page by clicking the key button.

Verify that the server is activated and information is correct.

If the server is not yet activated, you will need to enter the customer number and product key they were provided to activate the server.

E License Information	*
	۶
Server	
Customer Number TA00	
Product Key	
Licensed Users	
C Refresh License	
Deactivate Server	
Named Users	5
ANN	
DANIEL	
GUS	
JIMMY	
ЈОНИ	

It is also good practice to verify that the **Named users** are correct.

Installing the Application

1. The installer for Remote Service Manager must be run as an administrator. Microsoft does not provide the option in the right-click menu to run an .msi file as an administrator. To run the Remote Service installer as an administrator, do the following.

a. In your **Start** menu search field, enter *cmd* and hit CTRL+SHIFT+ENTER. Your search field differs depending on which version of Windows you are using.



A command prompt opens as an administrator.



- b. Type in the full path to where you saved the Remote Server installer. If the path has any spaces put the path inside quotes, for example, "C:\Users\username\My Documents\RSM.msi".
- c. Hit ENTER and agree to execute the .msi Remote Service Manager installer file. The installer opens.
- 2. Double-click on the RSM.msi file to open the Remote Service Manager installer.



3. Click [Next] to begin the installation.

The End-User License Agreement window displays.

📸 Remote Service Manager Setup
End-User License Agreement Please read the following license agreement carefully
1. <u>Definitions</u> . Capitalized terms used in this Agreement shall have the following meanings:
(a) "Confidential Information" means this Agreement, the Software, the Documentation, trade secrets embodied therein and any other written or electronic information that is either (i) marked as confidential and/or proprietary, or which is accompanied by written notice that such information is confidential and/or proprietary, or (ii) not marked or accompanied by notice that it is confidential and/or proprietary but which, if disclosed to any third party, could reasonably and foreseeably cause competitive harm to the owner of such information. Confidential Information shall not include information which, as demonstrated by the receiving party, is: (i) publicly evaluable (ii) lewfully obtained by a party from third party, extinue
☑ I accept the terms in the License Agreement
Print Back Next Cancel

- 4. Read through the License Agreement and check the **I accept the terms in the License Agreement** checkbox.
- 5. Click [Next]. The Web Application Settings window displays.

📸 Remote Service Manager Setup	
Web Application Settings Click Next to install with the selected web site and application.	
Web site:	
Default Web Site 🔹	
Application name:	
RSM	
Back Next Cancel	

- 6. In the **Web site** field, you specify where you want to install the web site. Use the dropdown menu to select the desired option. Typically you would select *Default Web Site*.
- 7. In the **Application name** field, enter a name that identifies Remote Service Manager in the virtual directory such as *RSM*.
- 8. Click [Next]. The Destination Folder window displays.

Destination Folder (()) REMOTE SERVICE Click Next to install Remote Service Manager to the selected folder.
Install Remote Service Manager to:
C:\inetpub\wwwroot\DGI einfo server\RSM\ Change
Back Next Cancel

9. In the Destination Folder window you choose the location where you want to install the Remote Service Manager components. Do one of the following.

• If you want to install the Remote Service Manager components in the default location, leave the path that is displayed in the Install Remote Service Manager to field.

ſ	📸 Remote Service Manager Setup
	Destination Folder ((Y)) REMOTE SERVICE Click Next to install Remote Service Manager to the selected folder.
	Install Remote Service Manager to:
<	C:\inetpub\wwwroot\DGI einfo server\RSM\ Change
	Back Next Cancel

• If you want to choose an alternate destination, do the following. a. Click [**Change...**].

闄 Remote Service Manager Setup	
Destination Folder Click Next to install Remote Service Manager to	the selected folder.
Install Remote Service Manager to:	
C:\inetpub\wwwroot\aGI einfo server\RSM\ Change	

The Change destination folder window displays.

Remote Service Manager Setup	×
Change destination folder Browse to the destination folder	(Y) REMOTE SERVICE MANAGER
Look in: Local Disk (C:)	• 🗈 📸
C:\	PerfLogs Program Files ROBOHELP 10 Temp Users
	OK Cancel

- b. Navigate to the location where you want to save the Remote Service Manager components.
- c. Click **[OK]** to save the destination and to return to Destination Folder window or click **[Cancel]** to return to the Destination Folder window with the default location selected.
- 10. In the Destination Folder window, click [Next]. The Database Connection Information window displays.

📸 Remote Service Manager Setup	
Database Connection Information	NOTE SERVICE MANAGER
SQL Server:	
, Full Access Password:	
Company ID:	
Sample	
Back Next	Cancel

Enter the appropriate information in the provided fields.
 SQL Server: Name of the server on which you are installing Remote Service Manager.
 Password: Full Access password.

Company ID: Name of the company database to which you want Remote Service Manager connected.

12. Click [Next]. The Ready to install Remote Service Manager window displays.



13. Click [Install] to install Remote Service Manager.

When the installation is complete the Completed the Remote Service Manager Setup Wizard window displays.

😸 Remote Service Manager	Setup
(T) REMOTE SERVICE MANAGER	Completed the Remote Service Manager Setup Wizard
	Click the Finish button to exit the Setup Wizard.
	Back Finish Cancel

14. Click [Finish]. Remote Service Manager is now installed.

Enabling the Emailing Functionality in Remote Service Manager

In order to be able to use the emailing functionality in Remote Service Manager, you must properly configure your Internet Information Services (IIS).

Internet Information Services (IIS) 7

To configure IIS 7 so you can use the email functionality in Remote Service Manager, do the following.

1. Open your Internet Information Services (IIS) 7 Manager.





2. In the left pane of the IIS 7 Manager, expand the menu for your server.



 In the left pane, expand Sites > Default Web Site and click on the Remote Service Manager application. The name varies depending on what you decided to name it. In the example below it is labeled RSM.



4. In the Features View, double-click on SMTP E-mail.

Concectors Image: Application Pools	🖏 Internet Information Services (IIS) Manager			
File View Help Connections	A State of the state of			
Connections	File View Help			
ASP Metric Application Pools Asp. Net Complexition Pools <t< th=""><th>Connections</th><th>•</th><th></th><th>Actions</th></t<>	Connections	•		Actions
	Connections Connections Start Page Connections Connections Start Page Connections Start Page Connections Start Page Connections Connectio	/RSM Home Filter ASP.NET S.NET ForoPages NET ForoFile Application Settings Machine Key Session State IS ASP Compression Directory Browsing Handler Mappings Handler Mappings Request Filtering Management Configuration Editor	Show All Group by: Area Image: Show All Group by: Area Image: Show All Group by: Area Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show All Image: Show A	Actions Maction Basic Settings View Virtual Directories Manage Application Browse Application Browse %80 (http) Advanced Settings Help Online Help
A DEPENDENT OF THE PROPERTY OF THE VIEW		Eestures View		
Ready	Ready			• • • • • • • • • • • • • • • • • • •

The SMTP E-mail window displays in the middle pane.

📬 Internet Information Services (IIS) Manager	
	😂 🛛 🟠 🔞 🗸
Elle View Help	
SMTP E-mail Start Page Start	Actions Apply Cancel Actions Help Online Help
Configuration: 'Default Web Site/RSM' web.config	€ <u> </u>

- 5. In the **E-mail address** field, enter the e-mail address you want as the sender for emails sent from Remote Service Manager.
- 6. Select one of the following.
 - **Deliver e-mail to SMTP server**: When selected, e-mail messages deliver immediately. This requires an operational SMTP server for which the user has appropriate credentials.
 - a. Either enter the unique name of your SMTP server in the SMTP Server field, or check the Use localhost checkbox to set the name to LocalHost.
 Note: When you set the name to LocalHost, ASP.NET uses an SMTP server on the local computer. Typically, this is the default SMTP virtual server.
 - b. In the **Port** field, enter a TCP port. Port 25 is the SMTP standard TCP port and is the default setting.

Note: If all servers are configured by using different IP addresses, more than one virtual server can use the same TCP port.

 In the Authentication Settings region, you specify the authentication mode and credentials if your SMTP server requires these.
 Select one of the following.

Not required: When selected your S

Not required: When selected, your SMTP server does not require authentication credentials.

Windows: Windows authentication is not supported for Remote Service Manager and Remote Tech.

Specify credentials: When selected you can specify the authentication credentials by clicking the [**Set...**] button. The Set Credentials window displays where you can specify a username and password.

Set Credentials	? ×
User name:	
Password:	
<u>C</u> onfirm password:	
ОК	Cancel

• Store e-mail in pickup directory: When selected e-mail messages are stored in a file location on disk for late delivery by the PHP application (or by a Microsoft ASP.NET application or by a user or administrator).

Enter the batch e-mail location in the provided field or click the [**Browse...**] button to navigate to the e-mail batch location.

7. In the right- pane of the IIS 7 Manager window, click [Apply] to save the SMTP e-mail settings.

