

Remote Service Manager

Installation & Configuration Guide

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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 Manager™ (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-info™ 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

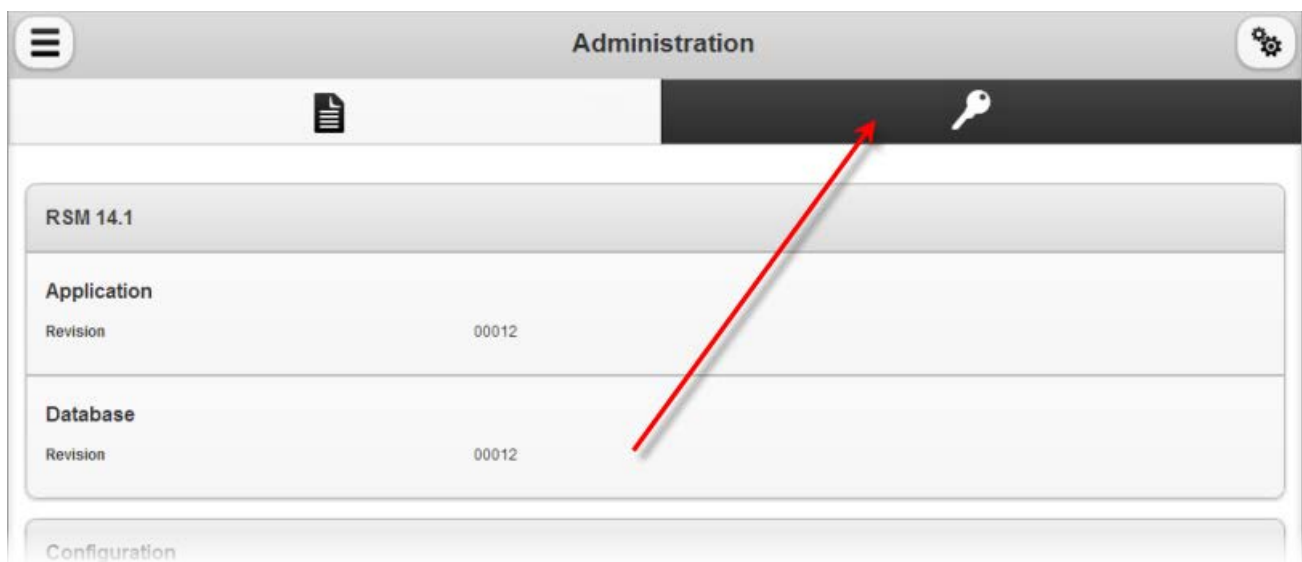
- The following are commonly used devices. All devices access RSM via a browser and require an internet connect via WiFi or cellular service.
- Smart Phone (iPhone, Android).
- Tablet (iPad, Android).
- Computer Workstation or Laptop.
- 1GB data plans are recommended.

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 ecustomer@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.

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.

License Information

Server

Customer Number

TA00

Product Key

Licensed Users

5

Refresh License

Deactivate Server

Named Users

5

ANN

DANIEL

GUS

JIMMY

JOHN

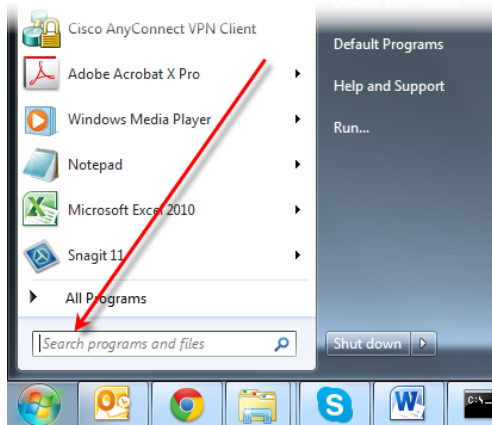
It is also good practice to verify that the **Named users** are correct.

Installing the Application

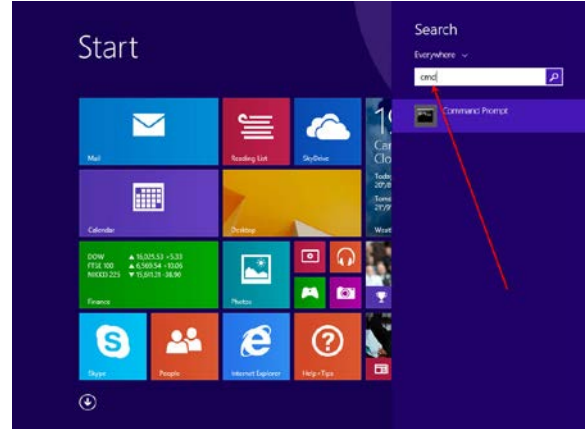
1. The installer for Remote Service Manager must be run as an administrator. Microsoft does not provide the option in the right-click menu to run an .msi file as an administrator. To run the Remote Service installer as an administrator, do the following.

- 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.

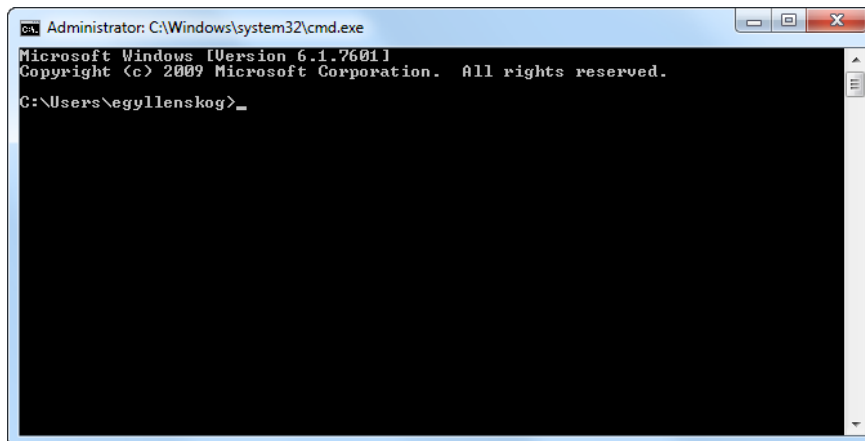
Windows 7 Search field



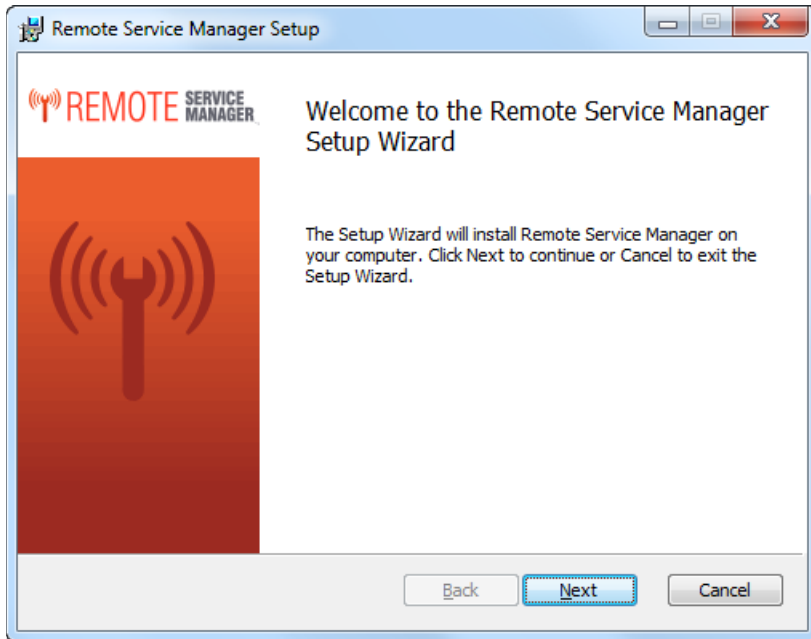
Windows 8 Search field



A command prompt opens as an administrator.

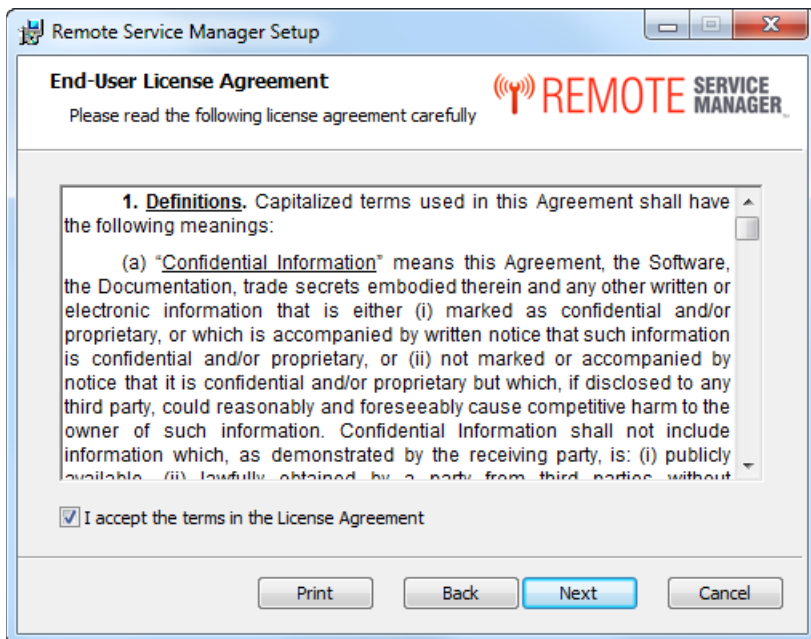


- b. Type in the full path to where you saved the Remote Server installer. If the path has any spaces put the path inside quotes, for example, "C:\Users\username\My Documents\RSM.msi".
- c. Hit ENTER and agree to execute the .msi Remote Service Manager installer file. The installer opens.
2. Double-click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

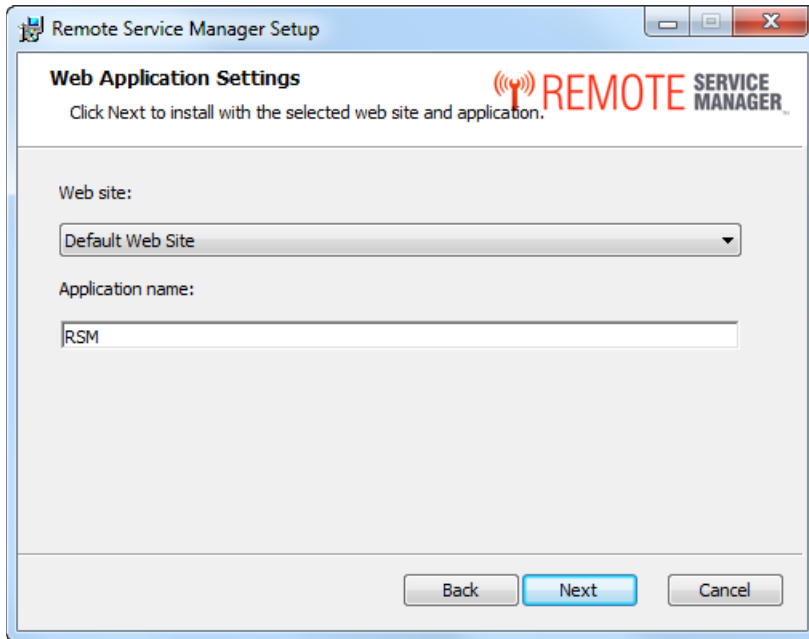


3. Click [**Next**] to begin the installation.

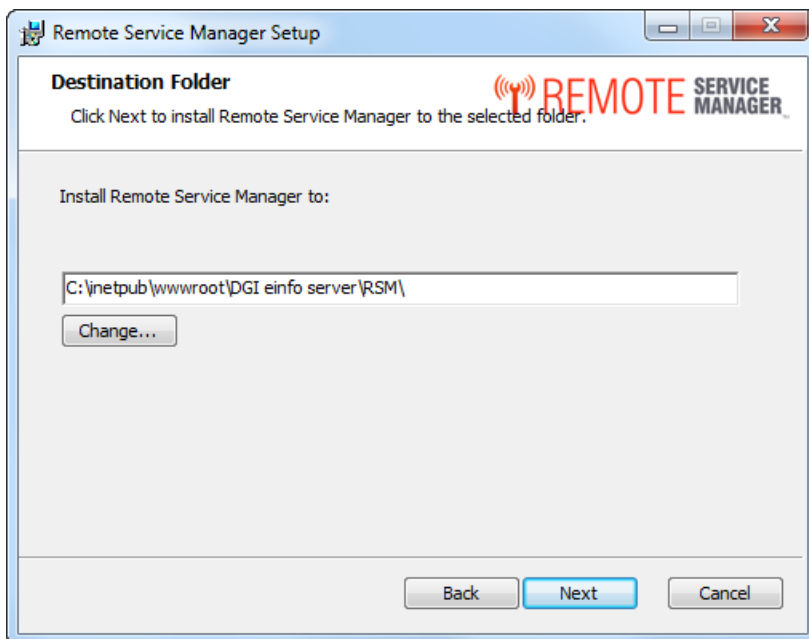
The End-User License Agreement window displays.



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.

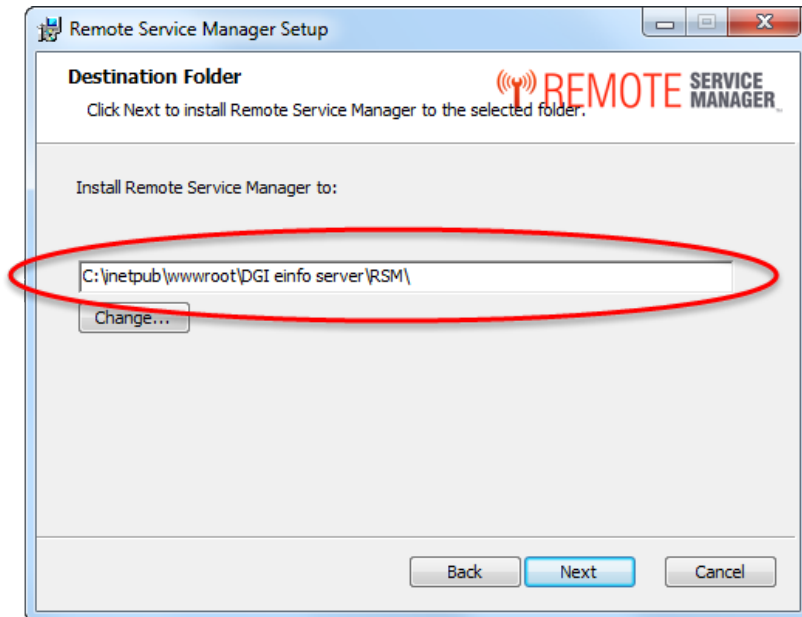


6. In the **Web site** field, you specify where you want to install the web site. Use the dropdown menu to select the desired option. Typically you would select *Default Web Site*.
7. In the **Application name** field, enter a name that identifies Remote Service Manager in the virtual directory such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

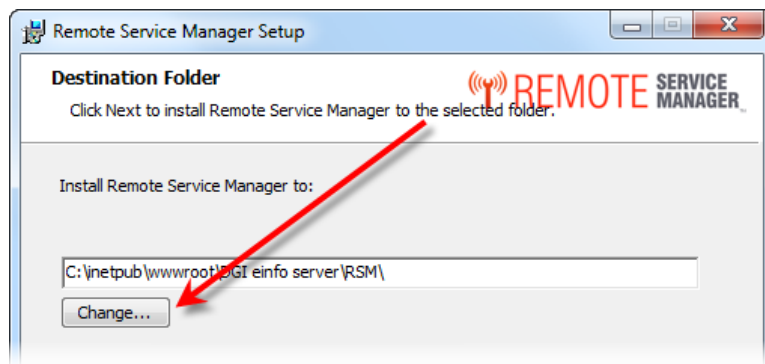


9. In the Destination Folder window you choose the location where you want to install the Remote Service Manager components. Do one of the following.

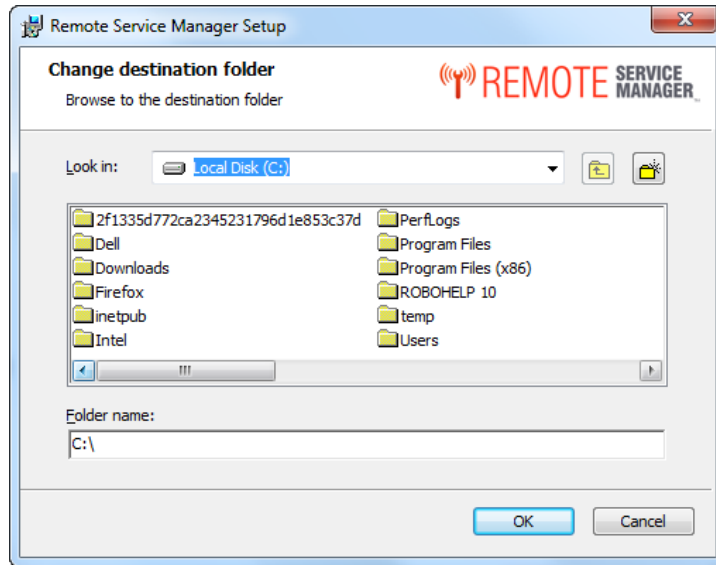
- If you want to install the Remote Service Manager components in the default location, leave the path that is displayed in the Install Remote Service Manager to field.



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

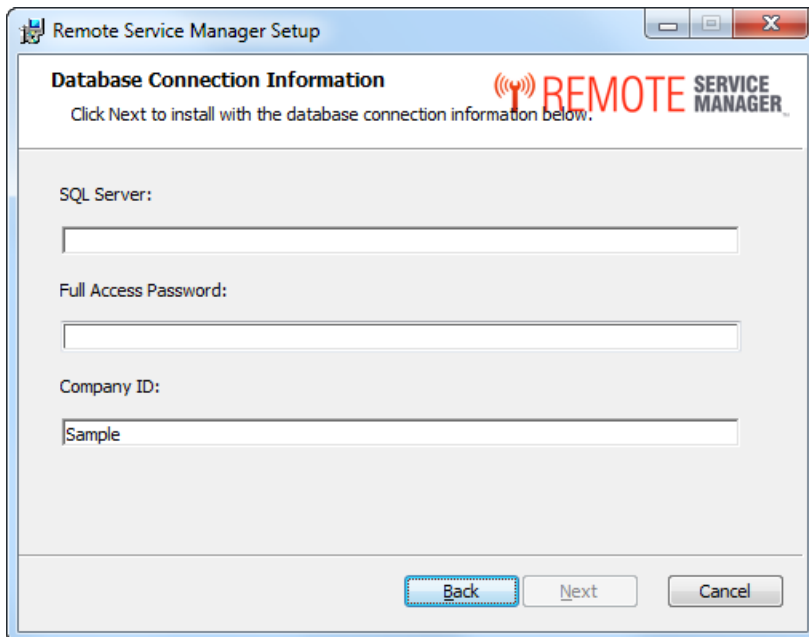


The Change destination folder window displays.



- 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.

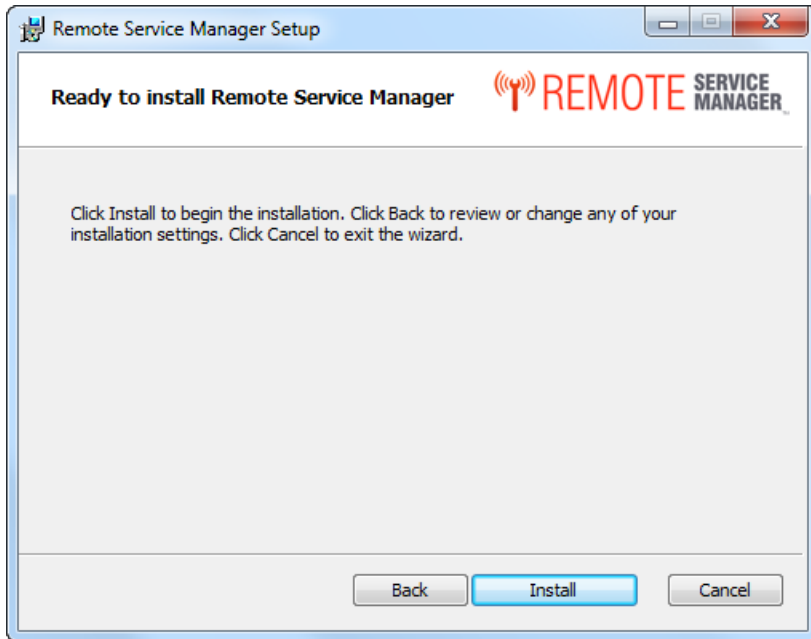
10. In the Destination Folder window, click [Next]. The Database Connection Information window displays.



11. 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.

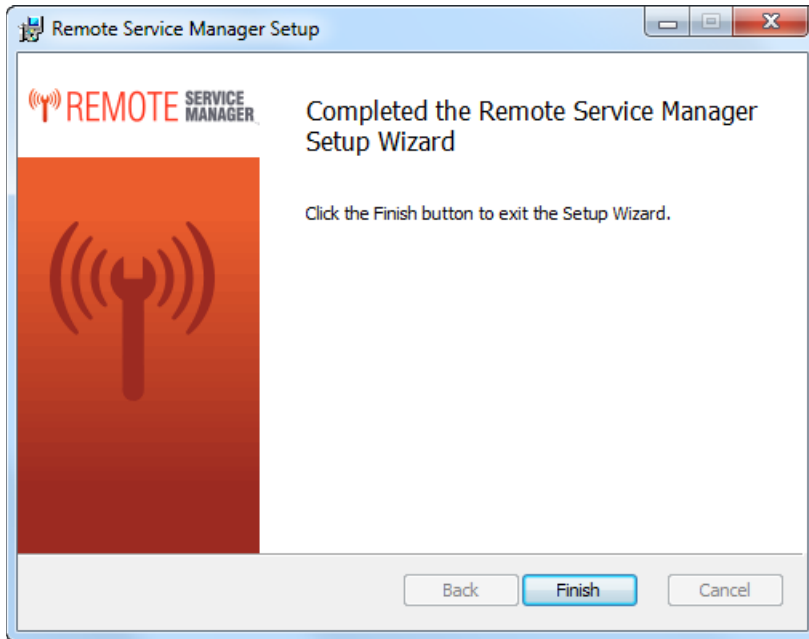
Company ID: Name of the company database to which you want Remote Service Manager connected.

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.



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

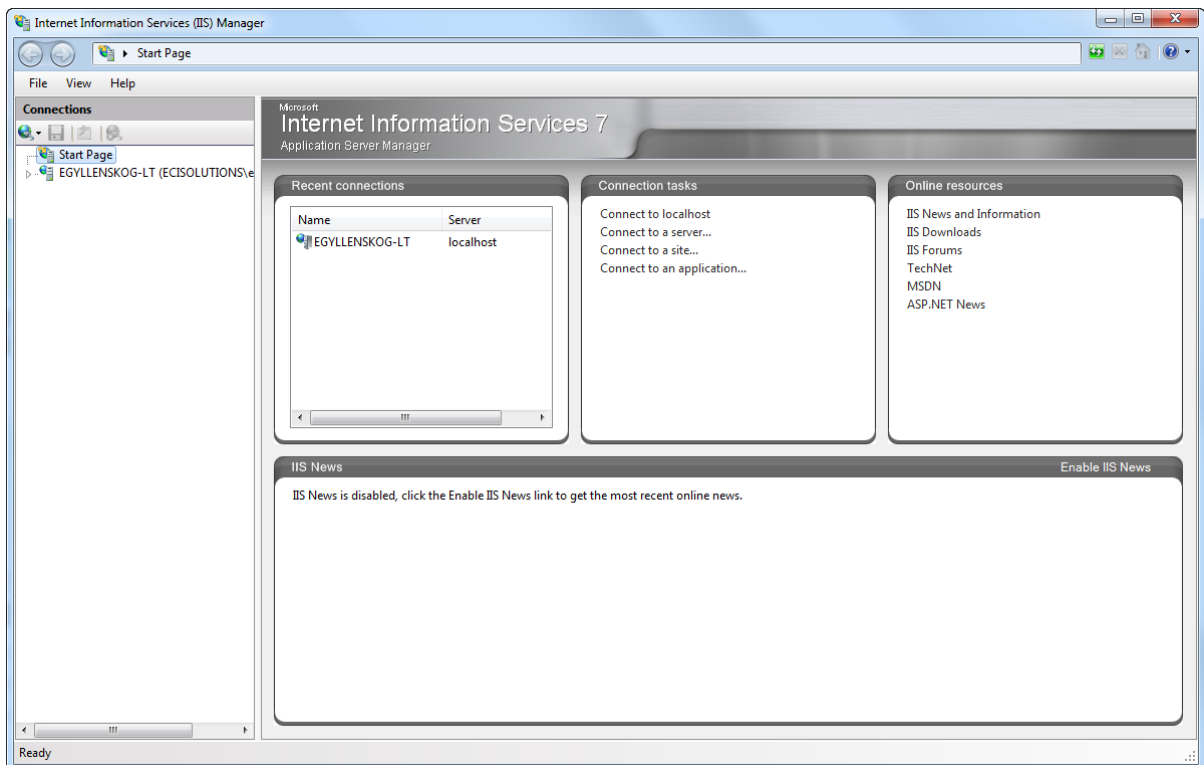
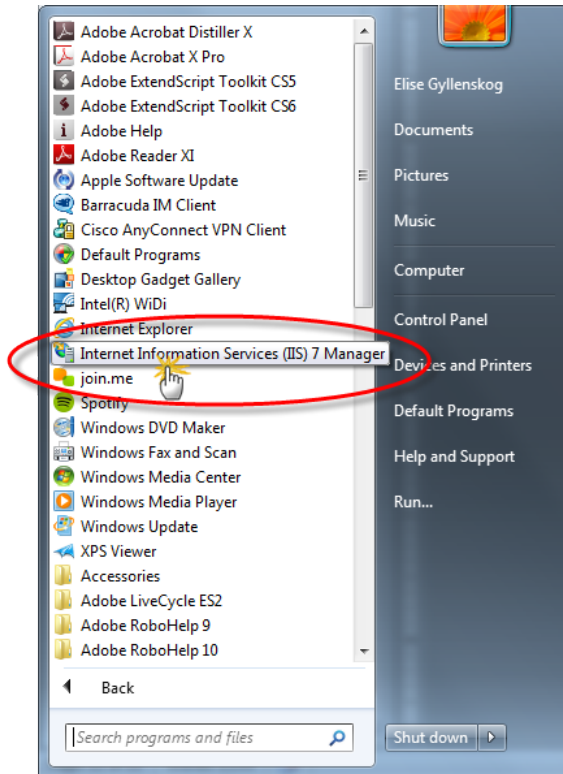
Enabling the Emailing Functionality in Remote Service Manager

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

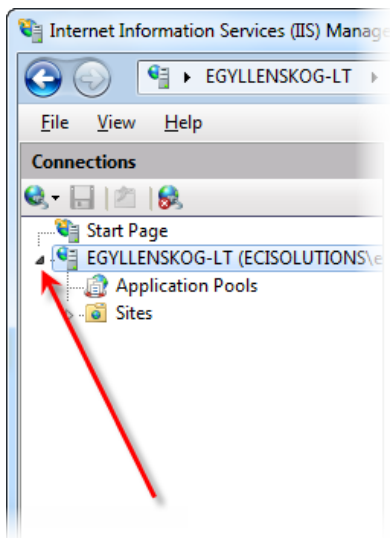
Internet Information Services (IIS) 7

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

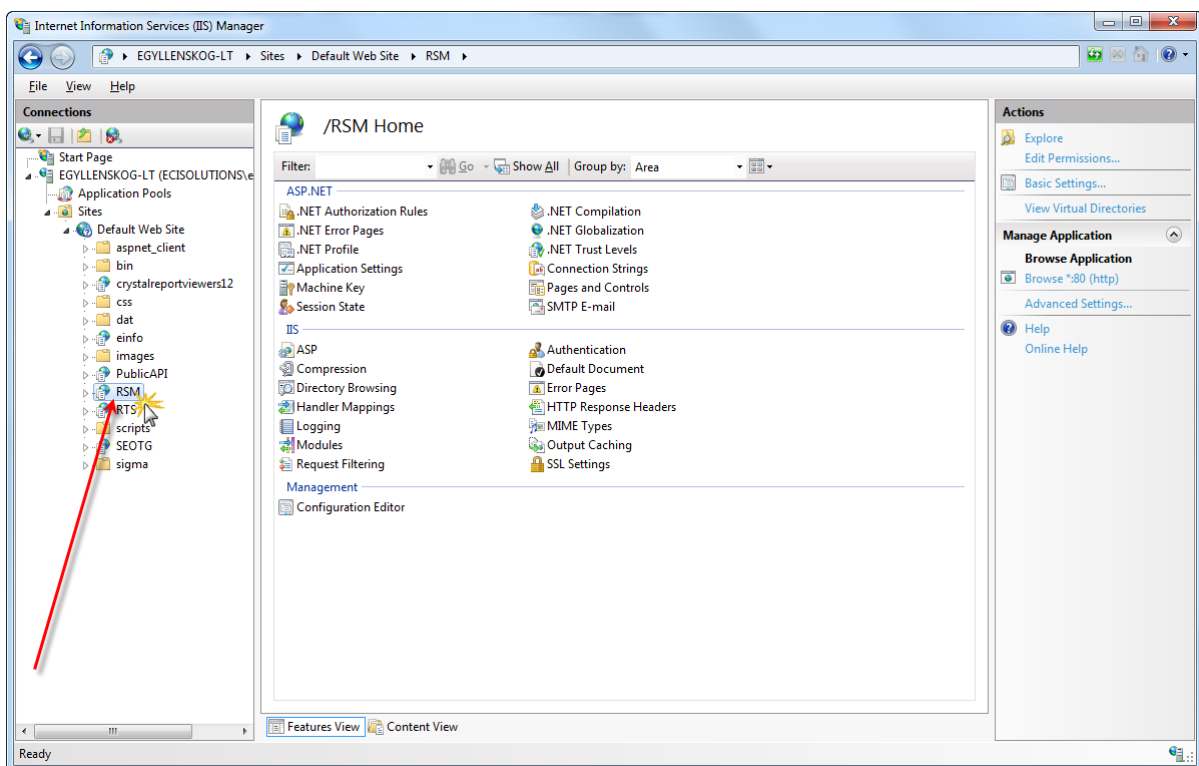
1. Open your Internet Information Services (IIS) 7 Manager.



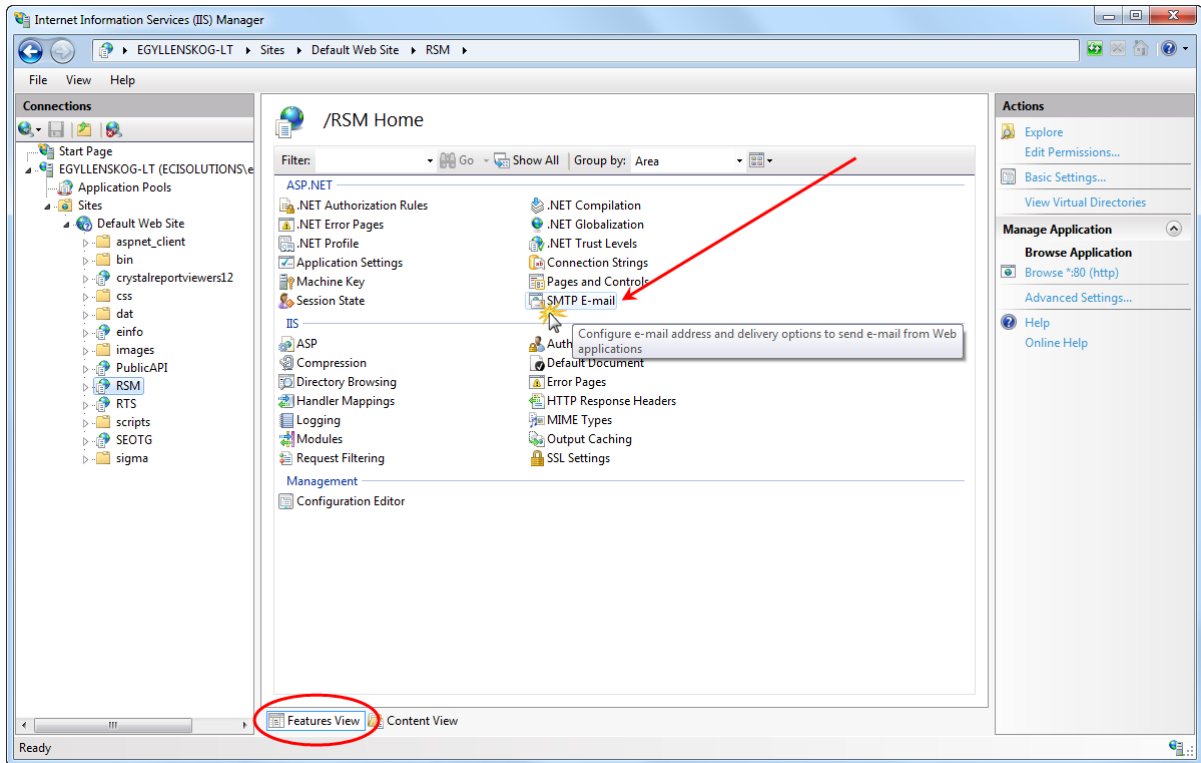
2. In the left pane of the IIS 7 Manager, expand the menu for your server.



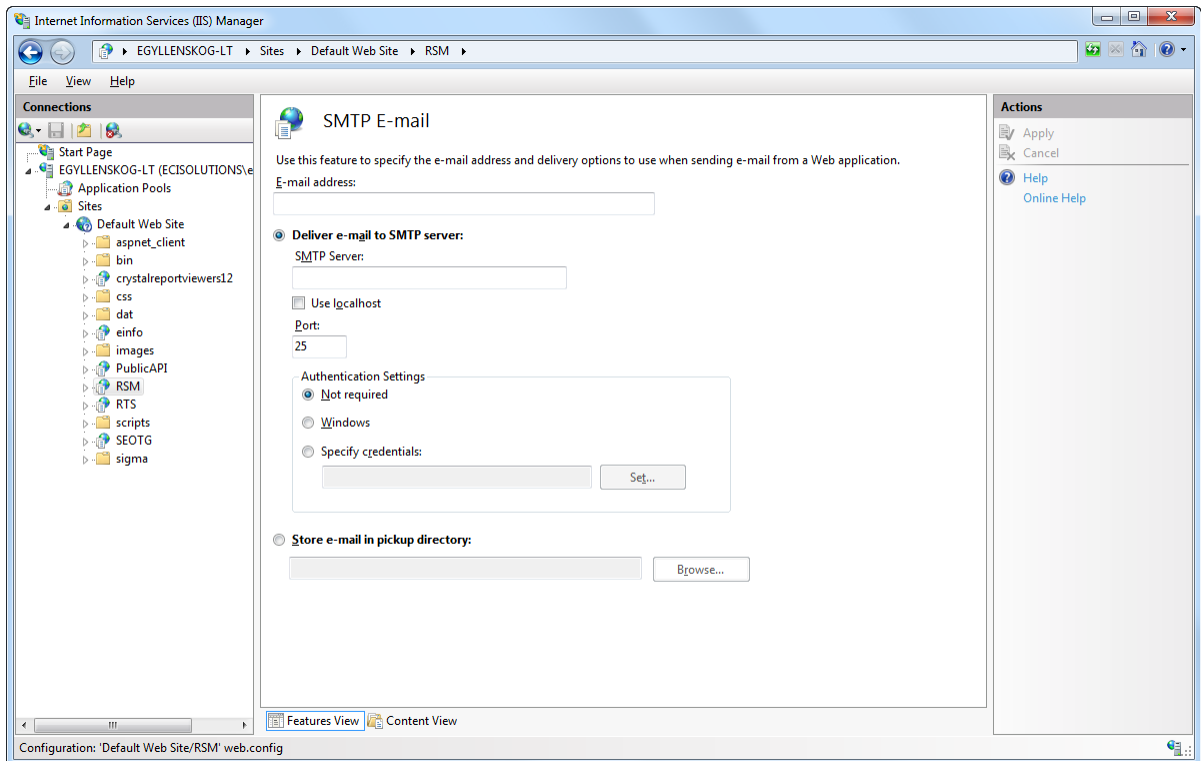
3. In the left pane, expand **Sites** > **Default Web Site** and click on the Remote Service Manager application. The name varies depending on what you decided to name it. In the example below it is labeled RSM.



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



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



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.

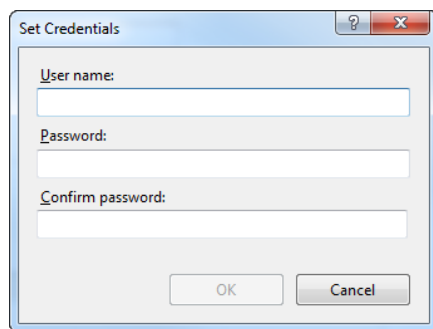
Note: When you set the name to LocalHost, ASP.NET uses an SMTP server on the local computer. Typically, this is the default SMTP virtual server.
 - b. In the **Port** field, enter a TCP port. Port 25 is the SMTP standard TCP port and is the default setting.

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

A screenshot of a Windows-style dialog box titled "Set Credentials". It contains three text input fields labeled "User name:", "Password:", and "Confirm password:". At the bottom of the dialog are two buttons: "OK" and "Cancel". The dialog has a standard Windows window border with a question mark icon and a close button (X) in the title bar.

- **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.

