Contents
Introduction – The Connect2Help Tray Icon........................................................................3
Step 1 – Downloading the Configuration Tool........................................................................4
Step 2 – Create your icon graphics and convert them to a .ico file.................................4
   Create 3 separate .png formatted graphic files using your favorite graphics editor........4
   Convert your .png graphic file into a .ico icon file.........................................................4
Step 3 – The Connect2Help Configuration Tool..................................................................6
   Open the Connect2Help Configuration Tool .................................................................6
   Choose File.......................................................................................................................6
   System Tray Options.......................................................................................................6
   Pop-Up Menu Options......................................................................................................7
   Branding............................................................................................................................7
   N-central Credentials......................................................................................................8
   Menu Options..................................................................................................................10
      Website.........................................................................................................................10
      Command....................................................................................................................11
      Attended Remote.........................................................................................................12
      Email.............................................................................................................................13
      Separator.......................................................................................................................15
   Arranging your completed menu items.........................................................................15
   Testing your menu item setup.........................................................................................15
   Installer Options............................................................................................................16
   Summary.........................................................................................................................16
Step 4 – Deployment of your Connect2Help Tray Tool through N-central..........................16
   Import your .msi file to the N-central Software Repository...........................................16
   Deploy your Connect2Help Tray Tool ...........................................................................17
      Deploying to specific devices add-hoc.........................................................................18
      Deploying globally using a Rule..................................................................................19
Appendix A – Software Push Troubleshooting................................................................22
Introduction – The Connect2Help Tray Icon

The Connect2Help tray icon is a deployable .msi file that will put a branded, multifunction pop-up tool on the desktops of your managed workstations and servers.

This icon will provide useful information to the client in the form of the device IP, logon server, logged in user account, and Agent status. It will also allow you to add customized links that will provide avenues for your clients to contact your support team, access web portals, and run common system commands.

Configuration, branding, deployment and updating will be covered in this document along with suggested uses, command lines, and branding tips.

If you have any additional questions beyond this document please attend the Daily Q&A with the N-able Sales Engineering team.

Details are available on the N-able Resource Center (http://nrc.n-able.com) under TRAINING > Live Technical Q&A.
**Step 1 – Downloading the Configuration Tool**

The tool can be found on the N-able Resource Center (http://nrc.n-able.com) under SUPPORT > DOWNLOADS > CONNECT2HELP TRAY ICON. Be sure to take the latest version.

Download the installer (.msi file) to your desktop and run it. This will add the “Connect2help Configuration Tool” to your system. With this tool we will build out customized installation package.

![N-able Resource Center](image1)

**Step 2 – Create your icon graphics and convert them to a .ico file**

You will likely want to create yourself a custom icon for the system tray. To do this:

Create 3 separate .png formatted graphic files using your favorite graphics editor.

- a. Ensure they are small (150 pixels square or so). Remember they will be shrunk to a size of about 20x20 pixels.
- b. They must be saved in .png format.
- c. They will be used to indicate “Agent is Active”, “Agent is Failed” and “Agent Status is Unknown”, so typically will include Green, Red and Grey (for example) in their design for each status:

![Example Icons](image2)

Convert your .png graphic file into a .ico icon file.

- d. Open a web browser and head to http://convertico.com. This is a third party site used to convert .png type images into useable .ico icon files.
- e. Choose to “Select File from your Computer” and **Browse** to find your first .png graphic file:
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f. Once selected, click “GO” to convert your file. It will appear in the right hand side column.

g. Click the converted icon in the right hand side column, and choose to download (Save As) the .ico file to your desktop:
h. Repeat this step for all .png graphics files. You should end up with .ico files ready for use.

Step 3 – The Connect2Help Configuration Tool
We will now use our 3 icons in the Connect2Help Configuration Tool to create our custom tray tool package.

Open the Connect2Help Configuration Tool
Find the application and open it. You will be presented with a Welcome message and a quick walkthrough of the process to build your tray icon.

Click “Next” at the bottom of the tool window.

Choose File
Click the “Create a new configuration” option unless you are editing an existing tray icon configuration. Give your new tray tool a name and SAVE. You can use this file to make tweaks to your tray tool over time.

Click “Next” at the bottom of the tool window.

System Tray Options
The System Tray Options section will allow you to import your branded status icons and configure the text that appears when you hover over the icon in its various states.

Choose “Select Icon” beside each option:

- **System Tray icon:** The “Normal” state of the icon and agent. Typically “Green” or a checkmark status.
- **Agent status check failed icon:** The “Agent failed” icon. This will appear instead of the Normal state when the N-central Agent service fails to start.
- **Agent Status check unknown icon:** The “Agent status is unknown” icon. This will appear if the N-central Agent has been uninstalled or is otherwise unresponsive.

Define the hover help-text for each icon state:

- **Hover text:** What to show when the Agent icon is “Normal”.
- **Status check failed:** What to show when the Agent icon is “Failed”.
- **Status check unknown:** What to show when the Agent status is “unknown”.

Click “Next” when finished.

**Pop-Up Menu Options**

1. Enter the Text that will appear at the top of your Tray icon when opened by the end user.

**Branding**

1. Choose to reveal the **Computer Name, IP Address** and **Logged on User name** in the tool on the client side by checking the “Show computer name, IP address, and logged-on user name in the pop-up menu” box.
2. Change the color or text to your liking. A real-time preview of your changes appears on the right.
3. Add a **Logo Image** (header) to your Connect2Help window by choosing to “Select an Image” of 400x100 or less *(must be a .png file)*
**N-central Credentials**

4. Enter your N-central Credentials. These will be used to pull information into your menu items.
   
   a. You will need to create a Service Organization ADMIN level account in N-central to use for this box. It is suggested an account be created for this purpose so the password will not change. User accounts can be created in N-central at the Service Organization level under Administration > User Management > User Accounts.

5. Click “**TEST**” to try the connection back to N-central.
**Troubleshooting Pop-up Menu Options**

Errors that may occur when TESTing the connection:

1. **2100 Invalid Username-password Combination**

   a. You have used N-central credentials that are incorrect.
      
      i. Ensure you are using the proper format for your username, enter it as you would on the login screen of your N-central server (for example *MyUsername@n-central.com* or *domain\MyUsername*).
      
      ii. Reset the password on your n-able user account.

2. **5000 Query failed, or Invalid URL: Hostname could not be parsed.**

   a. There is no functional agent detected on your system. An agent MUST be present to test the connection.
i. Check the “Windows Software Agent” service by running “services.msc” on your system and checking the service is Running and set to Auto.

ii. Reinstall your local N-central Agent.

Menu Options
Here you can add clickable, customizable buttons that can perform many functions for your end user including opening web links, executing system commands, requesting Attended Remote Control from N-central, and sending email to your support team.

Suggested actions and their command lines:

**Website**
Website can be used to launch the local default browser and link to a website of your choosing. It uses a set of variables pulled from N-central and the local device that include PC Name, Agent ID, Customer ID, Customer Name, and Device ID.

For example this is commonly used to open our own Help Desk Manager client portal (already linked with the proper customer) with the following link, substituting your own information for the items in red:


For a more generalized login to push that can be used accross multiple customers, simply link to the address of your HDM sever. Replace the address and port in red:

http://69.42.109.147:8081

More simply, you could access Google by adding:
**How do I take advantage of the available variables for Website?**

<table>
<thead>
<tr>
<th>PC Name</th>
<th>Agent ID</th>
<th>Customer ID</th>
<th>Customer Name</th>
<th>Device ID</th>
</tr>
</thead>
</table>

The options listed above can be used to insert into URL strings. This is needed when creating Attended Remote Control sessions, for example. Below is a listing of what each will return, and a sample:

**PC Name:** The DNS name of the device Connect2Help is installed on (eg: sparker-w8.office.n-able.com)

**Agent ID:** Also known as the “Appliance ID” from the Agent tab in N-central. (eg: 2129402391)

**Customer ID:** The ID that ties your device to its specific Customer in N-central (eg: 101)

**Customer Name:** The name of the N-central customer your device is associated with (eg: Smiths%20Tools). Note the %20 indicates a “space” in html.

**Device ID:** The identification number of your device in the N-central database. (eg: 912501487)

**Command**
This can be used to execute system commands that you might otherwise need to guide the user to in the Windows Command Prompt.

Examples of uses for this type of item:

Perhaps you would like to have your user ping a location to test internet connectivity. Instead of guiding them to the command prompt and asking them to type the command, we will add it to our tray tool with the following setup:
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Troubleshooting Command Items
If you do not specify the executable correctly you may run into an error such as this:

![Error: Unable to find the specified file.]

You must include the full path to the command and its extension (.exe); or if it is a native windows command, simply ensure you have included the extension. For example:

**Command to be run locally:** `cmd.exe`

**Arguments to pass:** `/k ping google.com`

Note: Commands line parameters that work from a command prompt will also work from Connect2Help. For a thorough list of these items please refer to an online resource.

Attended Remote
You might wish to allow your end users to initiate an Attended Remote Control session request using your N-central portal. Note that this takes advantage of the [***PCNAME***] variable.

The Web Address should appear as follows, substituting your own information for the items in red:

https://myncentralserver.company.com/loadAttendedRemoteControlAction.action?attendedCustomerId=1579&name=[***PCNAME***]&emailAddress=
Email
The Connect2Help tool can be used to configure and send an email to a recipient of your choosing – whether using their default mail client or a pop-up on their screen. It can also include a screenshot of the user’s desktop as well as capture clicks to visually detail the process your user took to arrive at their issue.

A typical configuration will appear as follows:

The above configuration demonstrates the following:

1) The label that will appear in the Connect2Help popup.
2) The email Recipient (To:).
3) The automatically populated **Subject** of your email including 2 variables of the **PC name** and the **Logged in user**.

4) A pre-formatted body “**template**” of your own design for the user to fill in.

5) A **screen capture** of the desktop (includes all screens in a single image).

6) A pop-up that will guide the user through **recording** their steps to recreate the problem.
   
   a. You may wish to make this a completely separate entry in Connect2Help, not every support case will require this recording.

7) Finally, an option to **TEST** your mail and see the results locally as seen below:

![Email with options](image1)

Should you choose to bypass the user mail program and use the built-in mail pop-up, be sure to configure a **SMTP Server**:

![SMTP Configuration](image2)
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Separator
This will simply include a divider line in your menu items for aesthetic reasons:

- Send Email to Support
- Test Internet Connectivity

Arranging your completed menu items
You can re-arrange the order of the items you have added on the MENU ITEMS screen by using highlighting the items and using the move up, down and delete buttons at the bottom of the tool:

Note: You may wish, for example, to separate items such as communication with your support team from local executables and tools.

Testing your menu item setup
At the bottom of the Menu Items screen is a small representation of your icon. Click it to see an example of what the finished product will look like. Make any adjustments necessary:
Choose “NEXT” when you have added all menu items and your test is successful.

Installer Options
Here you can configure the branded titles for the various elements of your install package.

Application Name: How the tool will appear in Add/Remove Programs in your system.

Publisher: Will show as Publisher in Add/Remove Programs in your system.

Installer File (requires .NET 4.0): This will be your installer

Summary
Review all of your settings and when satisfied, click “SAVE” to complete the setup and save your 2 setup files and 3 icon files to the same directory you specified when selecting to “CHOOSE A FILE” at the beginning of this process.

Step 4 – Deployment of your Connect2Help Tray Tool through N-central
We will now import your .msi file into N-central and deploy it through one of two possible ways: Manually per device or automatically through a Rule.

Import your .msi file to the N-central Software Repository
We will import your Connect2Help Tray deployment package into N-central so that we can deploy it as needed. Remember you have created 2 .msi packages. You will want to use the .NET 4 version only:

1. From the Service Organization level (orange by default) browse to CONFIGURATION > SCHEDULED TASK > SCRIPT/SOFTWARE REPOSITORY.
2. Choose to **ADD** a new **PUSH THIRD PARTY SOFTWARE**.
3. Give the Connect2Help tool a **Name** and **Description**.
4. Browse for and **select** the .NET4 Connect2Help .msi package (you named it in the Configuration Tool at the end of Step 3).
5. Skip the Parameters File section. It is not required.
6. Enter the following **Command Line Parameters**: `Connect2HelpDOTNet4package.msi /i /qn`
   a. Note the important spaces between the .msi file and the /i, and then again before the /qn. Eg: `Connect2HelpDOTNet4package.msi /i /qn`
   b. Also note that in the Command Line Parameters section the FILE NAME **must** remain.

**The end result should look similar to this example:**

![Add Script/Software Repository Item](image)

```
7. Click “OK” to save your third party software push file for later use.

**NOTE:** If you require a different .msi package per client (different links etc), you can simply repeat this process as needed but be sure to give the tasks customer specific names to readily identify them.

**Deploy your Connect2Help Tray Tool**

At this point you can decide to deploy the tool on an ad-hoc basis, or you can automate the process by using a Rule and Scheduled Task Profile.

**Add-Hoc:** Deploying add-hoc allows you to release the tool to specific PCs as you need to.

**Rule & Scheduled Task Profile:** This method will automatically deploy the tool to all devices you select.
**Deploying to specific devices add-hoc**

As the .msi is already loaded into N-central it is a simply process to push it to small groups of devices as needed.

1. From the ALL DEVICES view, select the systems you wish to push the tool to.
2. Select the “ADD SCHEDULED TASK” button from the top of the screen.

3. In the Push Third Party Software task window we will give the task a new name and select our Connect2Help deployment package from the Software Repository:

4. Skip to the tab for your **Schedule** and choose to deploy within X days if the system is offline:
5. Click “SAVE” to deploy the tool to your selected devices.
6. Review your installation progress under JOB STATUS in the View’s section. Consult APPENDIX A – Software Push Troubleshooting if you have any issues.

**Deploying globally using a Rule**
In the majority of cases it is more efficient and desirable to deploy the Connect2Help tool to groups of customers or machines. Using a Service Organization level Rule we can accomplish this.

First we will build a Scheduled Task Profile that contains the Connect2Help software push:

1) From the Service Organization level (orange by default) head under CONFIGURATION > SCHEDULED TASK > PROFILES.
2) ADD a new Profile.
3) Give your profile a name (ex: “Install Connect2Help Tray Tool”):

4) ADD a “Push Third Party Software” task.
5) In the Push Third Party Software task window we will give the task a new name and select our Connect2Help deployment package previously added to the Software Repository:

![Deployment Package](image)

6) Skip to the tab for your **Schedule** and choose to deploy within X days if the system is offline:

![Schedule](image)

7) Click “SAVE” to return to the Scheduled Task Profile configuration.
8) Click “SAVE” again to complete the Profile.

Next we will build our **Rule(s)** to deploy our tool to select clients/devices:

9) From the Service Organization level (orange by default) we will browse to **CONFIGURATION > MONITORING > RULES**.
   a. You may choose to deploy a different version of the Connect2Help tool per client (because of customer specific links etc), in which case build these Rules at each Customer level (green by default) rather than the Service Organization level.

10) **ADD** a new Rule.
11) Give your Rule a name (ex: Deployment – Connect2Help to Laptops and Workstations)
12) Under the **Devices to Target** tab add in filters for the types of devices you want to deploy to (eg: “Workstations and Laptops – Windows”)
13) Under the **Scheduled Task Profiles** tab move our Connect2Help task into the “selected” box on the right.
14) Under the **Grant Customers/Sites Access** tab *only available at the SO Level* move the customers you wish to deploy into over to the “selected” box on the right.

   a. If you plan to push the tool to ALL clients you will add all to the “selected” box and also check off *Propagate to all new customers/sites*.
   
   b. If you are building rules at the Customer level, step 14 is not needed.

All customers added into this Rule will now have Connect2Help deployed to all items met by the Filter in the first tab. In this example, to all Laptops and Workstations.

Review your installation progress under JOB STATUS in the View’s section. Consult **APPENDIX A – Software Push Troubleshooting** if you have any issues.
Appendix A – Software Push Troubleshooting

Things to verify with regards to pushing the Connect2Help Tool:

1. Is the Connect2Help .msi uploaded correctly?
   a. Try to execute the package you uploaded into the N-central, locally. Does it install correctly? If not, you may need to rebuild the .msi package.

2. Is the N-central Agent on the device out of date?
   a. Check the ALL DEVICES view for the system, Agent Version will be listed there.
   b. Your N-central current version will be listed under HELP at the bottom left of the N-central UI under Version Information.
   c. If the versions are not aligned, you can update the devices on the ALL DEVICES view by checking them off and choosing "NOW" from under the "Update Monitoring Software" button at the top of your screen.

3. When you created the push software task did you specify "Use Local Credentials"?

4. Was there feedback from the task that ran?
   a. At the SO level, under JOB STATUS, find the task that ran.
   b. Click into it, and click on STATUS
   c. Read or download and review the status logs. Do they indicate why the failure occurred?