The steps required to begin working with Customer Monitor:

OMER MONITOR

1. Create a maintainer access to the CM portal - The creation is performed at <u>Try CM</u> [1]. Overview of a **maintainer account's** functions is described in the section <u>Access roles >> Maintainer</u> [2].

2. Initial settings of CM portal - will be prompted automatically after login to the CM Portal. Read more about initial settings in the section <u>CM Portal >> Initial settings of CM portal</u> [3].

3. Adjust Helpdesk - description of Helpdesk settings is in the section <u>Helpdesk Customer Desk</u> [4]. Contact us for optimal configuration in your company, the presentation regarding (not just) Helpdesk in CM, will be of your benefit.

4. Create first company (customer) in the CM portal - read more about creating a company (customer) in the section <u>Creation of customer</u> [5].

5. Create operator accounts and access for customers - procedure of creation of an operator account is described in the section <u>Operators and groups</u> [6] and creation of a customer account is described in the section <u>Customer account</u> [7]

6. If you 're going to use technical functions of CM, install the C-Monitor clients (for Win, OS X, Linux/FreeBSD) - procedure for installation of clients to computers, as well as supported OS versions are described in sections <u>C-Monitor Windows client</u> [8], <u>C-Monitor Linux</u> client [9] and <u>C-Monitor (Mac) OS X client</u> [10]

After fulfilling steps 1-5, the system is ready for :

- Work with helpdesk Customer Desk
- Manual hardware evidence

After fulfilling step 6, the system is ready for :

- View of computers data (HW configurations, installed software, selected OS setting)
- Online information for the past 48 hours such as loading of CPU, RAM, network adapters etc.
- Notifying about incorrect standard parameters (based on samples 1x a day), such as low drive space, suspicious faulty disk, not updated antivirus, not updated OS Windows etc.

Next, we recommend you to set and process in the nearest step :

- Create customer accounts
- Set authorizations for Operators (i.e. remote access to a PC desktop, remote installations...)
- Set online monitoring of availability of critical computers (mostly servers)
- Set Backup
- Set Online Monitoring Watches (i.e. free space on disk, network connections...)
- Process the first SW audit, report about configuration and status of computers

Procedures of the settings and descriptions of other functions are listed in other articles of <u>How CM works</u> [11].

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Links

[1] https://customermonitor.eu/i-am-interested-cm/try-cm

[2] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-0

[3] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/cm-server-installation/initial



[4] https://customermonitor.eu/how-cm-works-0/helpdesk-customer-desk

[5] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/creation-customer

[6] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-1

[7] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-2

[8] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/c-monitorwindows-client

[9] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/c-monitor-linuxclient

[10] https://customermonitor.eu/how-cm-works-0/components-and-architecture-cm/c-monitor-mac-os-x-client

[11] https://customermonitor.eu/how-cm-works-0