

# Remote Support iOS Customer Client 2.2.17



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# Support Apple® iOS Devices with BeyondTrust

With BeyondTrust, support representatives can support Apple iPhone®, iPad®, and iPod touch® devices to help remote users resolve issues and configure settings. BeyondTrust makes possible screen-sharing support for iOS 8.0.+ devices attached to a standard OS X Yosemite or above screen sharing session. With the iOS customer client app, the remote user can also chat with the representative, and share images from the camera roll. Additionally, the representative can transfer files to the remote device and view its system information.

BeyondTrust also provides a portal for distribution of Apple iOS configuration profiles. These profiles can be installed on iOS devices to efficiently load settings, implement security policies, and so forth. Profiles are maintained through the administrative interface and can be either public, available to anyone who can access the support portal, or private, requiring an access key provided by a privileged representative.

Web-based click-to-chat is also available on Apple iOS devices. Click-to-chat allows you to easily chat with your remote customer without requiring your customer to download or run the BeyondTrust customer client app. To use click-to-chat, the remote user must use a modern browser supported by BeyondTrust.

Mobile device users can download the BeyondTrust Presentation Attendee Client to attend presentations given by your support team through BeyondTrust.

App developers can use the BeyondTrust Embedded Mobile App Support SDK to embed BeyondTrust's remote support technology into iOS applications. This allows you to support your mobile applications remotely by offering in-app remote screen viewing, custom special actions, custom system information, and file transfer to help resolve application or training issues your users are experiencing. The SDK is not covered in this document. If you develop your own apps and are interested in supporting those apps, contact your BeyondTrust Technical Support representative or submit a support request at www.beyondtrust.com/support.



# Screen Share with the iOS Device

Support your customer's Apple mobile devices through view-only screen sharing from your Windows, Mac, or Linux representative console.

# **Configure the iOS Device for Screen Sharing**

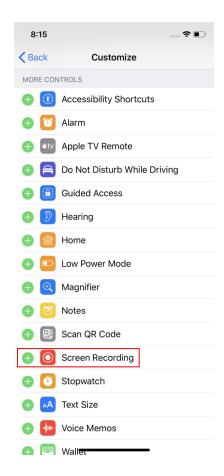
iOS mobile devices can share or broadcast their screen to other applications, such as the BeyondTrust customer client app. However, before a user can start screen sharing from their device, they must configure their device to use this functionality.

1. From the iOS device, go to Settings > Control Center.





Scroll down to the More Controls section and tap + by the Screen Recording option.
Screen Recording will then appear under the Include section. At this point, the iOS device can begin broadcasting its screen to other applications.

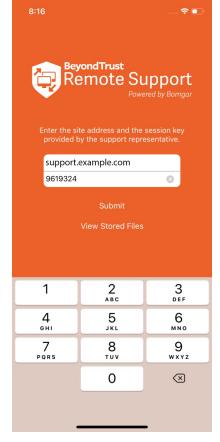


# **Start Screen Sharing with the BeyondTrust Remote Support Customer Client from an iOS Device**

Once a user has screen sharing enabled on their iOS device, they can use this functionality to share their screen with a helpdesk representative. This allows the representative to view the user's screen in real time to better troubleshoot issues being experienced with iOS applications or the mobile device itself. To start screen sharing with a representative from the BeyondTrust Remote Support customer client, follow the steps below.



- 1. Open the BeyondTrust Remote Support Customer Client app on the iOS device.
- 2. Enter the site name and session key provided by the representative. Tap Submit.
- 3. Once the representative accepts the session, the chat dialog appears.



4. Press the Screen Recording icon.



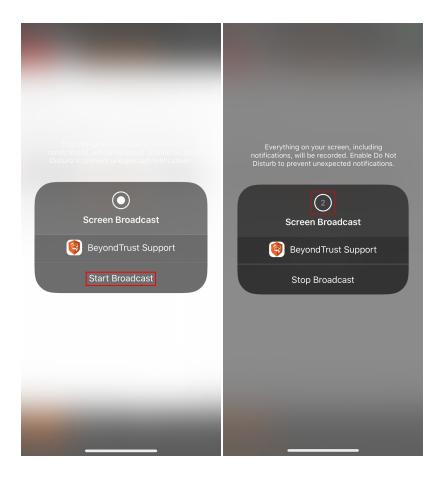
(17:09:00) A secure, encrypted connection has been established.

(17:09:04) Your support representative will be with you shortly. This session may be recorded for quality assurance.

\*(17:09:04) By continuing to use this application (which includes but not limited to, granting access to and/or viewing of your computer) you are agreeing to the following: Full Terms & Conditions

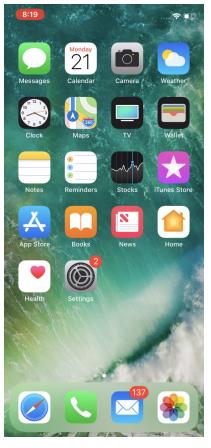


5. Then tap **Start Broadcast**. A countdown appears, indicating when broadcasting will begin.





6. Once screen sharing is in progress, a red bar appears at the top of the screen. As long as the red bar is present, the iOS user's screen is being shared with the BeyondTrust support representative.

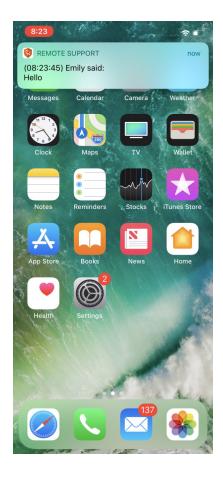


While screen sharing, the user can navigate in and out of applications, and the representative sees everything on the device's screen from the rep console.



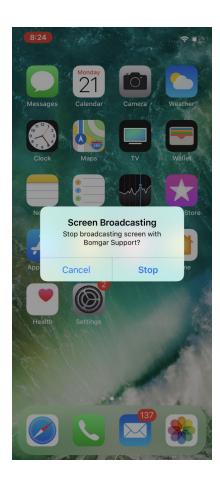


During the broadcast, the rep and user can continue to chat. The user receives chat popups from the rep at the top of the screen, and to respond, they simply tap the popup to begin typing their response.





Whenever the user wishes to end their screen broadcast, they tap the red bar and tap **Stop** on the **Screen Broadcasting** prompt.





#### IMPORTANT!

- While screen sharing, make sure to keep the BeyondTrust Remote Support customer client running on the iOS device to access chat.
- After screen sharing has been stopped, the user should immediately return to the customer client to continue receiving assistance.



# What Your Customer Sees: The iOS Customer Client

Customers on remote iPhones, iPads, and other iOS mobile devices interact with support reps primarily through the BeyondTrust iOS customer client.

They may also see prompts and messages in the context of the public site or support portal. This section details the customer-facing elements of a BeyondTrust remote support session on an iOS mobile device. For details on supporting other devices, including <a href="Android.com/And



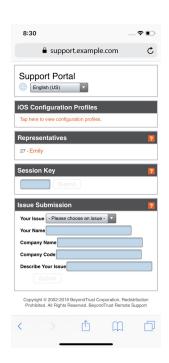
#### iOS Customer Client

To support an iOS device, start a session using either the full customer client app or a web-based click-to-chat session. While using the full customer client app provides the most tools for support, click-to-chat has the advantage of not requiring the customer to download an app. A click-to-chat session can be elevated at any time to request the customer to download the app and grant further support permissions.

# Use Click-to-Chat for Web-Based Chat on an iOS Device without a Download

To start a session with click-to-chat, your customer does not need to download the BeyondTrust customer client app. Instead, direct your customer to your public site. Your customer must use a modern browser supported by BeyondTrust.

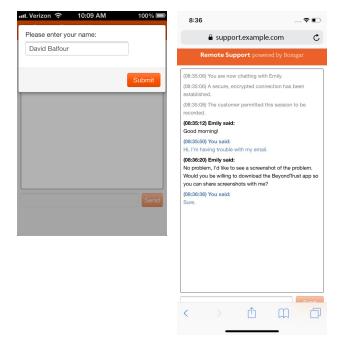
For click-to-chat to be available, your administrator must have enabled the click-to-chat option for at least one of the session start methods available from your public site. Click-to-chat is enabled from /login > Public Portals > Public Sites.





When your customer starts a session using a method that has click-to-chat enabled, a web-based chat session is initiated.

After your customer enters their name, accepts the prompt to allow chat with a representative, and chooses to allow or refuse screen recording, a support request enters a queue in the representative console. Accept the session to chat with your customer.



If you need to provide support at a level deeper than chat allows, you can request your customer to elevate to the BeyondTrust customer client app. Accepting the elevation request attempts to open the BeyondTrust customer client app. If the BeyondTrust app is already installed, the session will immediately become available. If the app needs to be downloaded, your customer is taken to the Apple App Store to download the free BeyondTrust customer client app. The session then continues as detailed in the next section of this guide.



# Download the iOS Customer Client App to Receive Support

The BeyondTrust customer client for iPhone®, iPad®, and iPod touch® is available for free download from the Apple App Store. From the iOS device, the user should search the App Store for "BeyondTrust" and then install the customer client app.

The BeyondTrust customer client is supported on iPhone®, iPad®, and iPod touch® devices running Apple iOS 6.0 and higher. Starting with BeyondTrust 15.2.1, Apple iOS 8.0 or later is required.



#### **IMPORTANT!**

Your B Series Appliance must be equipped with a valid SSL certificate signed by a certificate authority. BeyondTrust does not support using self-signed certificates for iOS device support. Once you have applied a CA-signed SSL certificate to your B Series Appliance, contact BeyondTrust Technical Support. Your support representative will create a new software build that integrates your SSL certificate. With this updated build installed on your B Series Appliance, iOS devices can run the BeyondTrust customer client to receive remote support.

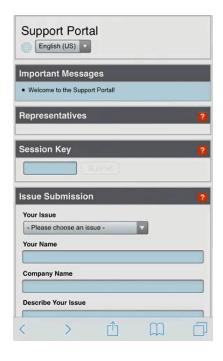


# Initiate an Apple iOS Support Session

Users of iOS mobile devices benefit from access to your professional support team. BeyondTrust enables you to support iOS devices, and you may begin this type of iOS device support via a representative-initiated support invitation or from your BeyondTrust support portal.

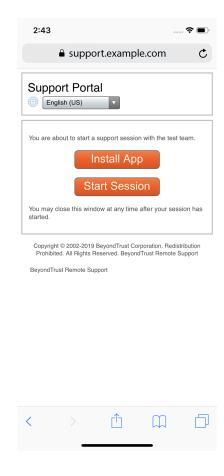
#### Start a Session through the Support Portal

 To initiate a support session, the customer must navigate to your organization's support portal e.g., support.example.com. From this page, the customer chooses how they wish to start the session. The options available on the page are determined by the permissions set within the /login interface.



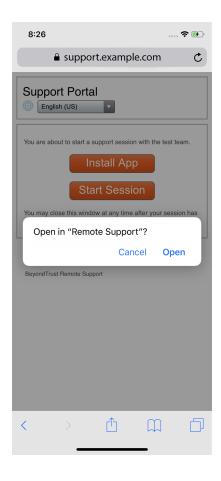


2. After a session start method has been chosen, the customer is presented with two options, **Install App** and **Start Session**. Note that the customer can also open the app by tapping on the **Open** option in the smart banner.





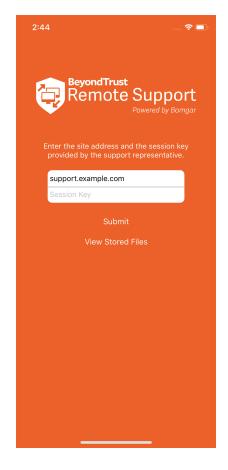
3. If the customer has the BeyondTrust Customer Client app installed on their iOS device, they may tap **Start Session** to begin the session. However, if the customer does not have the app installed, they should tap the **Install App** button. When tapped, the Apple Store opens, allowing them to download the BeyondTrust Customer Client app.





## Enter a Session Key to Start an Apple iOS Support Session

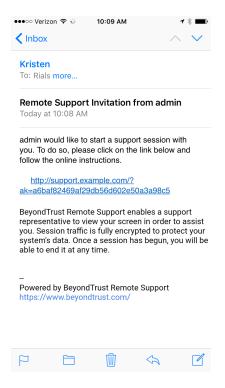
- 1. When the BeyondTrust Customer Client app is installed on the iOS device, the customer can use this app to begin a support session.
- 2. Upon accessing the app, the customer is prompted to enter their site address and session key. Both the address and the key are provided when the representative generates the session key from within the representative console. The representative can provide these values to the customer verbally, via email, or via SMS.
- 3. After tapping **Submit**, the connection is initiated. The customer may be prompted to accept an agreement and/or allow session information to be recorded before joining the session.





## Join a Support Session through Email

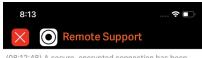
- 1. You can send an email invitation from the representative console. The email contains an invitation to join a support session along with a unique session key URL.
- 2. After receiving the email invite, your customer must tap the link within the email. The link takes them to a page where they can choose to begin a session by tapping on the **Install App** or **Start Session** button.
- 3. If the customer has the BeyondTrust Customer Client app installed on their iOS device, they may tap **Start Session** to begin the session. However, if the customer does not have the app installed, they should tap the **Install App** button. When tapped, the Apple Store opens, allowing them to download the BeyondTrust Customer Client app.





# Chat with the Apple iOS User During a Session

During a support session, the customer and representative can chat. The chat window records not only the messages and the time they were sent; it also serves as a running log of everything that happens throughout the session.



(08:12:48) A secure, encrypted connection has been established.

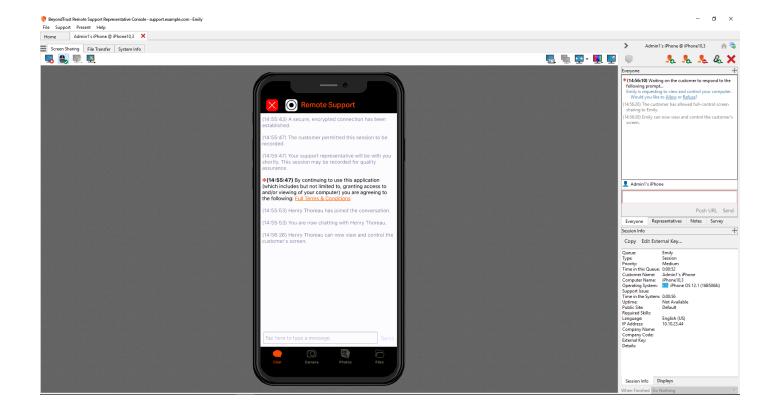
(08:13:13) The customer permitted this session to be recorded.

(08:13:13) Your support representative will be with you shortly. This session may be recorded for quality assurance.

\*(08:13:13) By continuing to use this application (which includes but not limited to, granting access to and/or viewing of your computer) you are agreeing to the following: Full Terms & Conditions







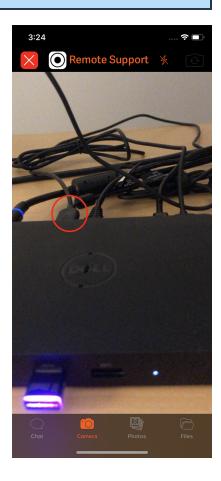


# **Stream Video Using Remote Camera Sharing**



**Note:** This feature is available only for Apple iOS 8.2+. Augmented Reality Annotations require iOS 11+ and Apple's A9 processor.

From the **Camera** tab, the customer can use their mobile device with VP9 technology to stream live video to the representative. Sharing live video footage of a desktop, device, appliance, kiosk, etc. while an issue is taking place gives the representative an additional way to assist the customer in finding a resolution to their problem.



To view the customer's live stream, the representative must first be screen sharing with the customer's device. Then, the customer must select the **Camera** tab in the customer client app. It is not possible for the representative to switch between tabs within the iOS customer client app.

When the customer's screen appears in the representative console, the representative can select the video quality from the **Select Quality** dropdown.





Note: For best results, use the More Colors or Full Color quality options.

While streaming, the customer can use native iOS camera controls to enhance the screen sharing experience. The customer can:



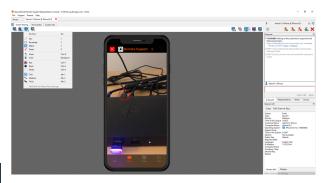
- Switch between the front and rear cameras by tapping the Camera icon in the top right corner of the screen.
- Turn on the camera's LED flash using the **Flash** icon in the top right corner of the screen.
- Use pinch gestures to initiate the camera's zoom feature. Once zoom is initiated, a slider bar appears and may also be used to adjust zoom level.

While viewing the footage, the representative can make annotations on a frame using the **Annotations** dropdown from the representative console. When the representative makes an annotation, the frame freezes, allowing the customer to view the annotation and take any necessary action. Once the representative clicks on the **Clear** option from the **Annotations** dropdown, the video begins streaming again.





**Note:** Annotations are not available in the web rep console or the mobile rep console.

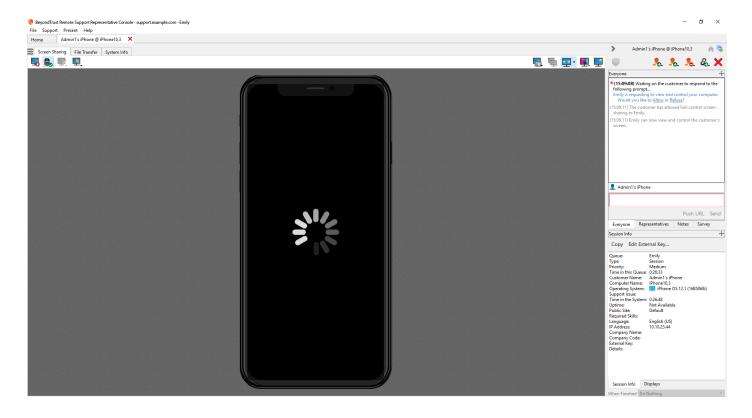


#### View Photos on the iOS Device Camera Roll

From the **Photos** tab, the customer can allow the representative to view images on the device's camera roll. Sharing captured screenshots of the device can help customers and representatives better understand and resolve issues.

To share an image, the customer must select the **Photos** tab in the BeyondTrust customer client app and then select a photo to share with the representative. While the customer is selecting an image, the representative will receive an "Unable to grab the remote screen image" message. This prevents the representative from seeing thumbnails of images the customer does not specifically choose to share.

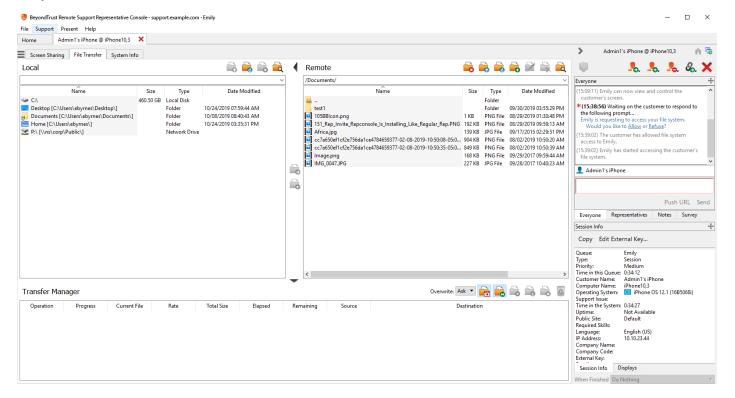
The customer must select the tab, as it is not possible for the representative to switch between tabs within the iOS BeyondTrust customer client app.





#### File Transfer to and from the iOS Device

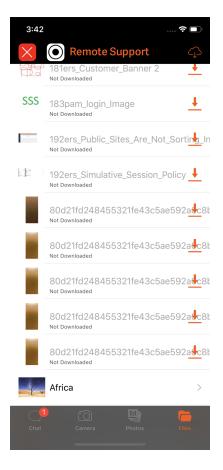
The iOS customer client includes a built-in file system which the representative can access from the **File Transfer** tab of the representative console. The representative can upload files to the remote device or download files that already exist in the customer client file system.





The customer can view the file list from the **Files** tab of the customer client. The customer must select the tab, as it is not possible for the representative to switch between tabs within the iOS customer client app.

To view a file, the customer can tap a filename.

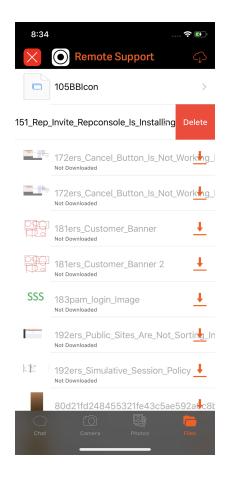




**Note:** If the customer wishes to view these files independently from a support session, they can open the customer client app and tap the **View Files** section.



Swiping a filename reveals the **Delete** button; the customer can tap **Delete** to remove the file from the customer client file system.

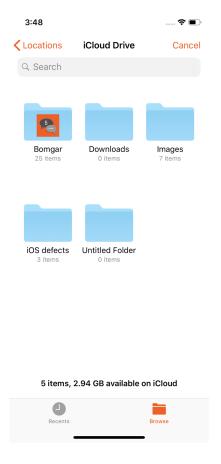




The customer can also share files with the representative from the iCloud Drive or any other document storage provider available on their mobile device.

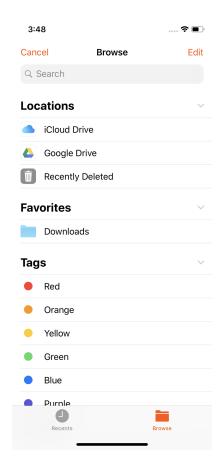
By tapping on the cloud icon in the top right corner, the customer can access files from the drive and tap on any filename to upload it to the **Files** section.

If the customer wishes to access other providers, such as Dropbox or OneDrive, they can tap on the **Locations** option in the top left corner of the iCloud Drive and receive a full list of all available providers.





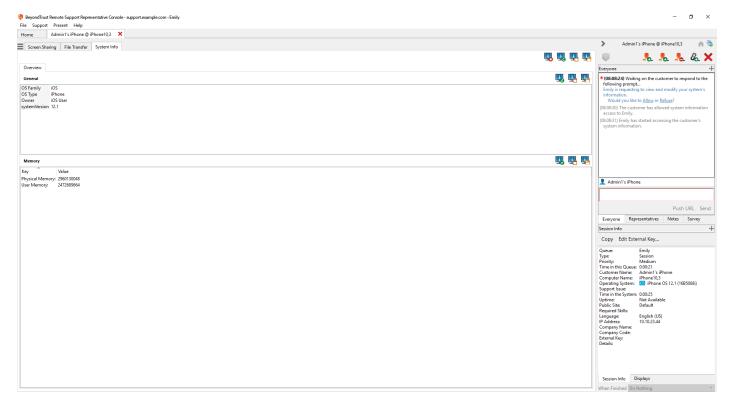
By tapping on a provider's name, the customer can view all of the files that are being stored by that provider and can tap on any file to upload it to the **Files** section.





# **View the iOS Device System Information**

The representative may view a complete snapshot of the remote iOS device's system information to speed time to diagnosis and issue resolution.





# **End the iOS Device Support Session**

The customer can terminate the session by tapping the red **X**. This will prompt the user to confirm that they want to end the support session.

When the session is ended by either the customer or the representative, an alert notifies the customer that the representative can no longer access their device. The BeyondTrust iOS customer client does remain installed after the termination of a support session so that if the customer needs support at a later time, the app does not need to be reinstalled.



# iOS Configuration Profiles

Apple iOS configuration profiles are XML files that quickly load settings and authorization information onto an iOS device. Configuration profiles might contain security policies, Wi-Fi settings, VPN configuration information, authentication credentials, Exchange account settings, email and calendar accounts, or certificates that permit iOS devices to work with a variety of systems.

# Add an Apple iOS Configuration Profile

Using Apple Configurator, available at https://support.apple.com/apple-configurator, set up and export a configuration profile.

To make this profile available to your iOS device users, sign into the /login administrative interface of your BeyondTrust site and go to Public Portals > Apple iOS.

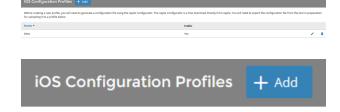
Click Add to add a public or private iOS configuration profile to this site.

Upload the Apple iOS profile, and enter a name and description that will help customers select the correct profile when browsing your support

To make this configuration profile available to any iOS user who access your public site, check **Public**. Leaving this option unchecked restricts access to this profile; a representative must generate an access key and provide it to the customer before the customer can view and download a private profile.

Click Save to save this configuration profile and its settings.

portal.



Before creating a new profile, you will need to generate a for uploading it to a profile below.





# Manage the Apple iOS Configuration Profiles Page

#### **Settings**

Configure your public site under **Apple iOS** :: **Settings**. Use the dropdown to select the site you want to manage.

Check **iOS** Configuration Profiles Page Enabled to make your configuration profiles available. When a customer uses an iOS device to view your public site, an **iOS** Configuration Profiles section is displayed above any other configured support options. This iOS section provides a link to the profiles page, where customers can download your public iOS configuration profiles or submit an access key to download private configuration profiles.

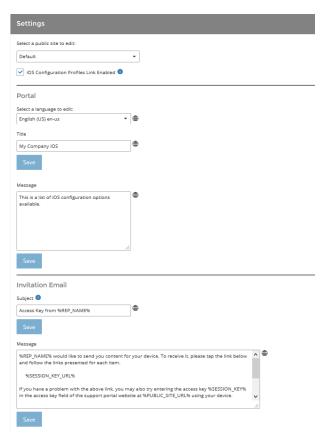
If the iOS Configuration Profiles Page Enabled option is not checked, iOS users visiting your public site will see the normal support portal without the ability to access any configuration profiles. If none of your public sites have this option enabled, the **Generate Apple iOS Profile Access Key** option is not available within the representative console.

#### **Portal**

Provide a title and message for your iOS portal. The message could include instructions for downloading configuration profiles or for obtaining support. Telephone numbers within the message are automatically displayed as links on the portal page - assuming that the telephone number format is comprehensible to the mobile Safari browser - allowing iPhone users to simply tap the link to dial the number.

#### **Invitation Email**

Customize the invitation email that representatives can send to customers after generating an iOS profile access key from the representative console. The message can contain placeholders for the representative's name and the public site URL, as well as for the access key or access key URL needed to download private configuration profiles.



TC: 10/4/2023

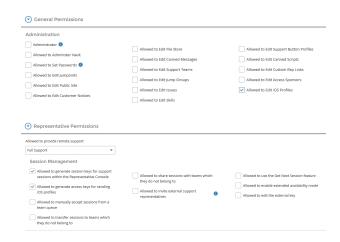


# Set Security Levels for Accessing iOS Configuration Profiles

#### **iOS Administrative User Permissions**

Two iOS permissions exist for user accounts. In the /login administrative interface, go to Users & Security > Users and/or Group Policies.

- Allowed to Edit iOS Profiles enables the user to add, delete, or modify iOS profiles in the administrative interface. Modifications might include renaming a profile, revising its description, or switching its access level from public to private or from private to public.
- Allowed to generate access keys for sending iOS profiles enables the user to generate access keys from within the representative console. An iOS customer must submit a valid access key on the public site to download a private configuration profile.



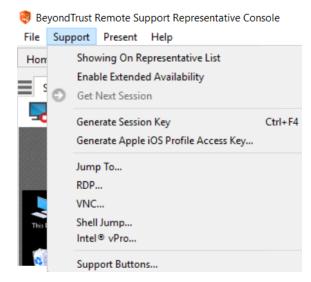
#### **Public Site Security**

To ensure that configuration profiles are downloaded to iOS devices over an encrypted HTTPS connection, go to the **Management > Security** page of the **/login** administrative interface and check **Force Public Site to Use HTTPS**. Otherwise, configuration profile downloads will occur over unencrypted HTTP connections.

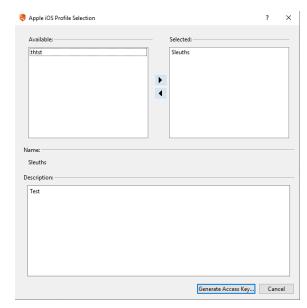


# Generate Apple iOS Profile Access Keys

While an iOS device user may browse to public profiles on your BeyondTrust site, they must submit an access key to download private profiles. To direct a customer to a specific iOS configuration profile - public or private - log in to the representative console, open the **Support** menu, and select **Generate Apple iOS Profile Access Key**.<sup>1</sup>



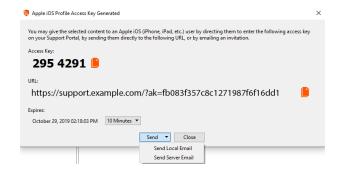
In the **Apple iOS Profile Selection** interface, select one or more configuration profiles and then click **Generate Access Key**.



<sup>&</sup>lt;sup>1</sup>If the **Generate Apple iOS Profile Access Key** option is not available, verify that your account permissions allow access key generation and that the iOS configuration profiles page is enabled for at least one public site.



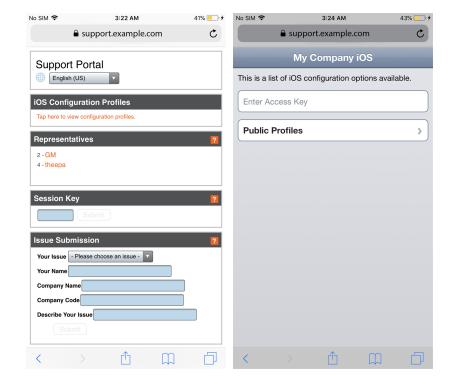
Set how long the generated access key may be used to access private profiles. From the **Public Portal** dropdown, select which site to use. You may provide your customer with the access key to submit on your public site, or you may send your customer to the direct URL. Click **Send to iOS Device** to send an invitation message to your customer via SMS or email.





# Install an iOS Configuration Profile on an Apple iOS Device

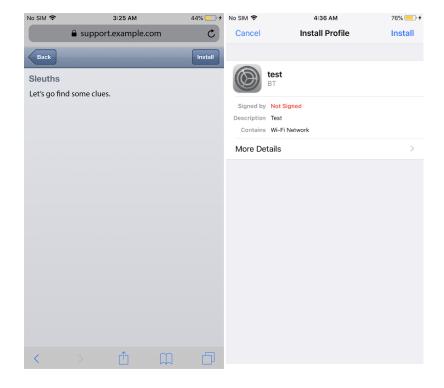
When a support site with iOS configuration profiles enabled detects a request from an Apple iOS device, it displays a link to the profiles page. From the profiles page, the customer can download public configuration profiles or submit an access key to download private configuration files.



When a representative generates an access key and provides it to the customer, the customer can either submit the access key code on the iOS page or go directly to the access key URL. Either action will take the customer to a page listing the configuration profiles for which the support representative generated the key. Once the access key has expired, it can no longer be used to view or download private profiles.



Selecting a profile name displays its description as set in the administrative interface. When the customer taps **Install**, the iOS device displays further details about the contents of the configuration profile. The customer should then tap the second **Install** button.



An alert notifies the customer that installing the profile will change settings on their device. Once the customer taps **Install Now**, the profile is applied to the iOS device.





# **Configure Mobile Device Management for iOS**

BeyondTrust supports management of iOS devices with mobile device management (MDM). The MDM configuration profile may be configured so that the URL of a support site is pre-populated in the **Site Address** field. The profile may also be configured to prevent this field from being edited.

The method by which you configure your profile will vary depending on your MDM product. Consult your MDM documentation for exact steps.

Below are the configurable keys that you will need to add to your MDM payload:

Key	Type/Description
PreviousSupportURL	String: The BeyondTrust support site address. For example, support.example.com.
SiteLocked	Boolean: If true, then editing the site address within the customer client is disabled.



### Join a Presentation from an iOS Device



**Note:** The presentation feature must be enabled when your support site is built. If it is not available and you need to run presentations, please contact Support or your site administrator.



#### **IMPORTANT!**

The presentation feature is being deprecated as of Remote Support 22.1 and is not included in new site deployments. For upgrades, it is turned ON, but you can opt to turn it OFF. If you have a new site deployment and you need to run presentations, please contact Support or your site administrator.

In order to join a presentation, your attendee must download the BeyondTrust presentation app from the Apple App Store. The BeyondTrust presentation client is supported on iPad®, iPhone®, and iPod touch® devices running Apple iOS 8.0 and higher.

The attendee will be prompted to enter a site address. This is the web address of your BeyondTrust public site.

The attendee can then enter an access key or select a presentation from the list. The access key is generated when the presentation is created and can be found in the presentation schedule or in the active presentation interface. The presenter can provide this access key to the attendee verbally or via email.

To select a presentation from the list, your public site must be configured to show a presentation list. Additionally, the presentation must be started and must have the **Showing on Public List** box checked. When the customer taps the **Refresh** button, the available presentations are listed. The attendee must then select the presentation and tap the **Action** button to the right of the selected presentation.







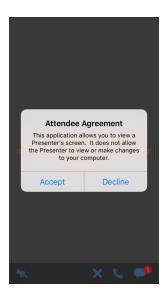




Your administrator can determine which messages your attendee sees, if any, before the presentation begins. Messages that may be displayed include an attendee agreement and a greeting.

If no one is available to give the presentation, an orphaned presentation message may also be displayed.

Additionally, certain non-customizable messages appear when the presentation has not started, when screen sharing is paused, and when the presentation has finished.



Tap the **Pin** button to pin the toolbar in place. If unpinned, the toolbar at the bottom of the screen disappears after a few seconds. Tap the screen to show or hide the toolbar.



During a presentation, attendees can view your desktop or selected applications and can also chat with you alone, or with you and other attendees.



The attendee can pinch to zoom during the presentation.





To view conference details, the attendee can tap the **Details** button. This displays the presentation name, the presenter's status, and dial-in information. If your attendee is on a phone that is capable of simultaneous voice and data, or is using WiFI for its data connection, they can tap the phone number to initiate a call.





To leave the presentation, the attendee can tap the **Close** button. If the presentation is still in progress, the attendee is prompted to confirm that they want to leave the presentation.



If the presenter ends the session, the attendee sees a message indicating that the presentation has ended.

The presentation client app stays installed so that the attendee can access future presentations.

