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Technical Note #52

Remote Technical support using Carbon Copy

Subject: Configuring a Host (customer site) for Remote Technical Support.

Applies To: All customers' PCs

Recommendation:

Install and configure Compaq's Carbon Copy 32 version 5.0 on all PMCS hosts and view nodes. For convenience, purchase all new machines with pre-installed internal modems. The modems must be compatible with NT4.0, and Carbon Copy 32. A unique feature of this program is the ability to use a PC's sound card, speakers and microphone to communicate to another PC using it's sound card, speakers and microphone. This could be used if the customer has only one phone line and must switch it between the PC and telephone to talk to the developer.

Configuring Carbon Copy 32

The directions are for a quick reference. Please refer to the Carbon Copy user manual to answer any questions you may have.

Setting up "Wait for Call" on host PC

Carbon Copy must be set up to Wait for Calls before answering a call from another Carbon Copy user. The first time you select Wait for Call, or, if you have used Carbon Copy before, but did not select any devices to wait for call on, the Wait for Call dialog box appears. For more information on the Wait for Call dialog box, see Selecting Devices to Wait for Incoming Calls.

Wait For Call on Startup

The Wait for Call on Startup option determines if Carbon Copy will automatically be set to answer calls the next time you start Carbon Copy. A PC can be left unattended if it is set to Wait for Call on Startup.

To answer calls automatically when you start Carbon Copy:

1. Open the Communications dialog box, located on the Options menu.
2. Select the Wait for Call tab.

3. Select the Wait for Call on Startup checkbox in the Options section of the dialog box.
4. If you want Carbon Copy to run minimized when you wait for calls, select the Minimize on Wait for Call checkbox.

Notes...

- Carbon Copy must be Waiting for Calls to answer a remote PC trying to establish a connection.
- You can also choose Wait for Call with the Wait for Call push-button or command, to answer calls immediately.
- While you are Waiting for Calls, you can use other Windows applications, but not other Carbon Copy utilities.
- Check the Status tab for a list of devices that you have set to Wait for Call. The Status tab lists the device name, and if it has successfully been set to Wait for Call.
- A PC can be unattended if it is set to wait for call. When waiting for calls, the Carbon Copy - Waiting for Call message appears at top of the Carbon Copy window, and the Wait for Call button changes to Waiting.

Login Security

The options on the Logins tab of the Security Options dialog box allow you to require logins from callers connecting to your PC. You can also select how many incorrect login attempts the caller will get before they are disconnected. If you select Require Logins, each caller must provide a login name to connect with your PC. You set up login names for callers on the User Profiles tab in the main Carbon Copy window. When connection security is enabled, you can also choose if each caller must provide a login password. By default, login names and passwords are NOT required

To set login security options:

1. Select or deselect the Require Logins check box. When you select this checkbox, all callers must provide a valid login name to gain access to your PC. When you leave this box unchecked, callers will have unprotected access to your PC.
2. If you are using Windows NT and if Carbon Copy is running as a service - if it was loaded before the Windows login prompt - then you have the option of using Native NT Security. Native NT Security uses Windows NT user accounts to determine which callers have access to your PC. Native NT security also gives you the option of logging off your NT workstation when a user connects via Carbon Copy. This is an added level of security to prevent unauthorized access.
3. Select the number of Login Attempts you want the caller to have. By default, 3 login attempts are allowed. You can allow a minimum of 1 login attempt, and a maximum of 10.
4. Select the Login Timeout, in seconds. This is the amount of time the user has to attempt to login. By default, 30 seconds are allowed. You can allow a minimum of 1 second and a maximum of 60 seconds.
5. Set the minimum length for the login password to 3. The login password you assign to the remote user must be at least the

number of characters specified here.

6. Click OK to save your changes, or click Cancel to cancel your changes and exit the dialog box.

Adding a New User Profile

Each User Profile must include a user name. It may also include a login password and callback phone number. If the Require Logins checkbox on the Security dialog box is selected, all callers are prompted to enter a login name. If a Callback Phone Number is selected for a caller, your PC hangs up and calls back the number when the caller establishes a connection.

To add a new User Profile:

1. Click on User Profiles to display the User Profiles tab.
2. Double click on the Create New User icon, or select Create New User from the File menu.The first Create New User Wizard dialog box appears. Click Next to continue.
3. In the User Name text box, type a name for the user who will access your PC. Each entry must have a User Name. If you want the caller to provide a password to gain access to your PC, select the Login Password text box and type a login password. By default, the login password must be at least 6 characters long. See "To set login security options" above on how to change this setting to 3. The login password is displayed as asterisks as you type. In the Confirm Password text box, type the login password again exactly as you typed it the first time. If you do not require the caller to provide a password to log on to your PC, leave the Login Password text box blank. Click the Next button to continue.
4. If you want your PC to hang up and call back a specified number when the caller establishes a connection, select one of the following callback types. None: No callback is performed. This is the default.

   - Fixed: Call the PC at the number specified in the Callback Phone Number field. You must enter a phone number in the Callback Phone Number field when you select Fixed.
   - Roving: When you select Roving, entering a phone number in the Callback Phone Number field is optional. If you enter a number in this field, it becomes the default number. When the user who originates the call dials in, the default call back number, if supplied, appears in the Roving Callback dialog box. The connection can be made using this phone number, or users can change this number if they are at a different location.
   - Passthrough: Passthrough works in the same way as Roving Callback, except you are given the additional option of completely bypassing the callback by pressing P when the Callback dialog box appears.After selecting a callback type, click the Next button to continue.

5. Select the Carbon Copy applications that the user will have

access to when connected to your PC. By default, all the applications are selected except for the Phone Book, User Profiles and the Security Options dialog box. Click the Next button to continue.

6. The final dialog box appears, telling you that you have successfully created a new Carbon Copy user. If you want to make any changes to this connection now, click the Back button. Your changes are saved when you click the Finish button.

Notes...

- You can change the required length of the login password on Logins tab, on the Security Options dialog box.
- User Profiles login names and login passwords may contain any displayable character (including spaces), and are NOT case sensitive. Callback phone numbers may include digits from 0-9, the * (asterisk) and # (pound sign), and dial modifiers supported by your modem (such as a comma for a pause). You may add characters such as hyphens and spaces to make the phone number more readable. Carbon Copy will accept up to 38 phone number characters, but some modems have lower limits.
- You can edit a User Profile during a connection, or while using any other Carbon Copy utilities.
- The fact that login passwords are not displayed provides added security for your PC. Login names you assign are visible in any user's Phone Book that has an entry for you. Login passwords always show as asterisks. You cannot guarantee that everyone who puts you in their Phone Book will restrict access to it, even though they could. Because of this, it's best to assign a login password for each login name if security is important.

Making a Connection

To make a connection:

1. Display the Phone Book tab. Select the connection icon you want to use to make the connection.
2. Select the Call button in the main Carbon Copy window, or select Place a Call, located on the Connections menu. The Connect dialog box appears.
3. Press Connect to start the call. If you want to cancel the call, press the Cancel button.
4. If the other PC does not requires callers to login, the connection is established. If the other PC requires callers to login and the Phone Book entry you are using contains a valid login name and password, they are sent automatically. Otherwise, enter the login name, GE, and password, EDC, and choose OK. The login password appears as asterisks. By default, you are allowed three login attempts before you are disconnected.

Notes...

- The PC you are calling must be set to Wait for Calls.
- Any Carbon Copy utilities you selected to start upon

connection will start after the connection is made. Remote Control is selected to start upon connection by default.

Callers -

caller name "GE"
caller's login name "GE"
caller's password "EDC"

Protect Item - password "EDC" **x** Required to modify properties

Security Options - Change minimum password length to 3

NT Com Port Settings:

Main / Control Panel / Ports

- Baud Rate = (fastest speed your modem supports)
- Data Bits = 8
- Parity = None
- Stop Bits = 1
- Flow Control = None

Additional Information Needed:

Window's computer name
NT Administrator password
telephone number

Test Functionality:

Reboot computer, login to NT, and verify that a "Carbon Copy waiting…" icon appears in a minimized state. Contact Plainville's QMI group and supply them with the Additional Information Needed. The QMI group will connect to the computer and provide confirmation of a successful remote connection.

Keywords:
Carbon Copy 32;

Related Notes:
Please use the Carbon Copy 32 User's Guide for any additional information.

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