January 30, 2026

Table of Contents

1 Overview 4
1.1 Netop Portal 4
1.2 Technical requirements – Portal website 4
1.3 Technical requirements - OnDemand Sessions web client 5
1.4 Technical requirements - OnDemand Sessions desktop application 5
2 General 7
2.1 Authentication 7
2.1.1 Forgot Password 9
2.2 User Interface 10
2.2.1 Filter Information 11
2.3 User Profile 13
2.3.1 Edit Profile Details 14
2.3.2 Change Your Password 14
2.3.3 Generate recovery codes 15
3 How to remote control a device 17
3.1 My devices – permanent devices (attended and unattended) 19
3.1.1. Target device – Host setup 19
3.1.2 Technician device 35
3.2 OnDemand Sessions 40
3.2.1 Browser Based Support Console – OnDemand Sessions 42
3.2.2 Start an OnDemand Session application on a Windows machine 50
3.2.3 Initiate an OnDemand Session remote connection 52
3.2.4 OnDemand Sessions Clipboard functionality 56
3.2.5 Start an OnDemand Session application on a macOS machine 58
3.2.6 Start an OnDemand Session application on an iOS device 67
4 How to manage your account 88
4.1 Manage Users 89
4.1.1 Create a new user 90
4.1.2 LDAP users - automatically added into the Portal at first login 99
4.1.3 Multiple accounts 99
4.1.4 View User Info 103
4.1.5 Edit the user 104
4.1.6 Remove user 106
4.1.7 Remove multiple users 107
4.1.8 Set up the default remote control action 108
4.2 Manage Groups 110

4.2.1 Create a new group 111
4.2.2 Attach users to user groups 111
4.2.3 Add Azure AD user groups 112
4.2.4 LDAP user groups 115
4.2.5 Attach devices to device groups 118
4.2.6 View group details 119
4.2.7 Edit Groups 120
4.2.8 Remove groups 120
4.3 Manage Devices 121
4.3.1 Edit devices 122
4.3.2 Remove devices 123
4.3.3 Favorite Devices 124
4.3.4 My Mobile Devices 125
4.3.5 Applications 126
4.4 Roles and Role assignments 128
4.4.1 View Predefined Roles 129
4.4.2 How to add a role 130
4.4.3 How to edit a role 130
4.4.4 How to copy a role 131
4.4.5 How to remove a role 132
4.4.6 Add role assignment 133
4.4.7 Edit role assignment 134
4.4.8 Create a schedule for a role assignment 136
4.4.9 Remove role assignments 142
4.4.10 Confirm Access role 142
4.4.11 Whitelisted applications role 147
4.4.12 Check permissions 150
4.5 Downloads - using Deployment Packages 152
4.5.1 Create a deployment package 153
4.5.2 Download and install the Host using default configuration 155
4.5.3 Download and install online installer using a custom Host configuration (Windows) 158
4.5.4 Mass deploy the Host (Windows) 159
4.5.5 Revoke deployment packages 159
4.5.6 Remove deployment packages 160
4.5.7 Pending state 160
5 Security 161
5.1 Enable Multi-Factor authentication 161

5.2 Authentication 163
5.2.1 LDAP authentication 163
5.2.2 ADFS/Azure AD authentication 164
5.3 Enable logging 166
5.3.1 Enabling audit logging 167
5.3.2 Retrieve Audit Logs 167
6 Account Configuration 169
6.1 Account details 169
6.2 Change the account owner 171
6.3 Change Portal logo 172
7 How to contact the Netop support team 173

1 Overview

This guide is intended to explain how to use the **Netop Portal**.

1.1 Netop Portal

The **Portal** has two primary functions:

- **Communication relay** – the **Portal** acts as a secure relay service to connect the **Guest** and **Host** modules.
- **Management console** - the **Portal** provides a browser-based interface that allows users to:
  - Manage access control
  - View connected devices (**Hosts**)
  - View audit logs
  - Create remote sessions using a lightweight support console

1.2 Technical requirements – Portal website

The **Portal** provides a browser-based interface. Here is a list of supported browsers and versions based on the operating system.

Operating System	Supported Browser
Windows	Chrome latest version, Firefox latest version, and Microsoft Edge based on Chromium and Internet Explorer 11.
macOS	Chrome latest version, Firefox latest version, and Safari latest version.
Linux	Chrome latest version, Firefox latest version.

1.3 Technical requirements - OnDemand Sessions web client

The **OnDemand Sessions** functionality in the **Portal** requires a web browser on the client-side. Here is a list of supported browsers and versions based on the operating system.

Operating System	Supported Browser
Windows	Chrome latest version, Firefox latest version, and Microsoft Edge based on Chromium
macOS	Chrome latest version, Firefox latest version, and Safari latest version.
Linux	Chrome latest version, Firefox latest version.

1.4 Technical requirements - OnDemand Sessions desktop application

The **OnDemand Sessions** functionality in the **Portal** requires an application to be executed on the device to be controlled. Here is a list of supported operating systems and platforms for that application.

Operating System	Supported Platforms
Windows	Platform: 32 & 64-bit Windows 11: Home, Pro Windows 10: Home, Pro, Enterprise and Education, IoT Windows 8.1: Professional, Enterprise Windows 7: Starter, Home Basic, Home Premium, Professional, Ultimate, Enterprise (SP 0,1) Windows Server 2019: Essentials, Standard, Datacenter Windows Server 2016: Standard, Datacenter Windows Server 2012 R2: Foundation, Essentials, Standard, Datacenter **NOTE**: For Windows 8.1, 7, and Windows Server 2012 R2, the OnDemand Session desktop application works only if TLS 1.2 is enabled.

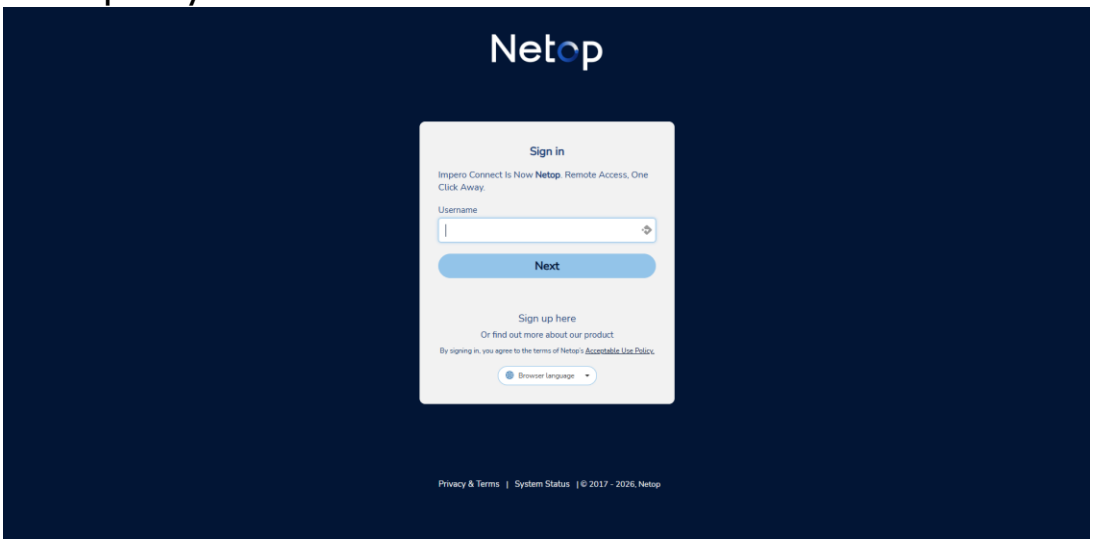
Operating System	Supported Platforms
macOS	macOS 15 Monterey macOS 14 Sonoma macOS 13 Ventura macOS 12 Monterey macOS 11 Big Sur macOS 10.15 Catalina macOS 10.14 Mojave macOS 10.13 High Sierra
iOS	iOS 13 iOS 14 or higher

2 General

2.1 Authentication

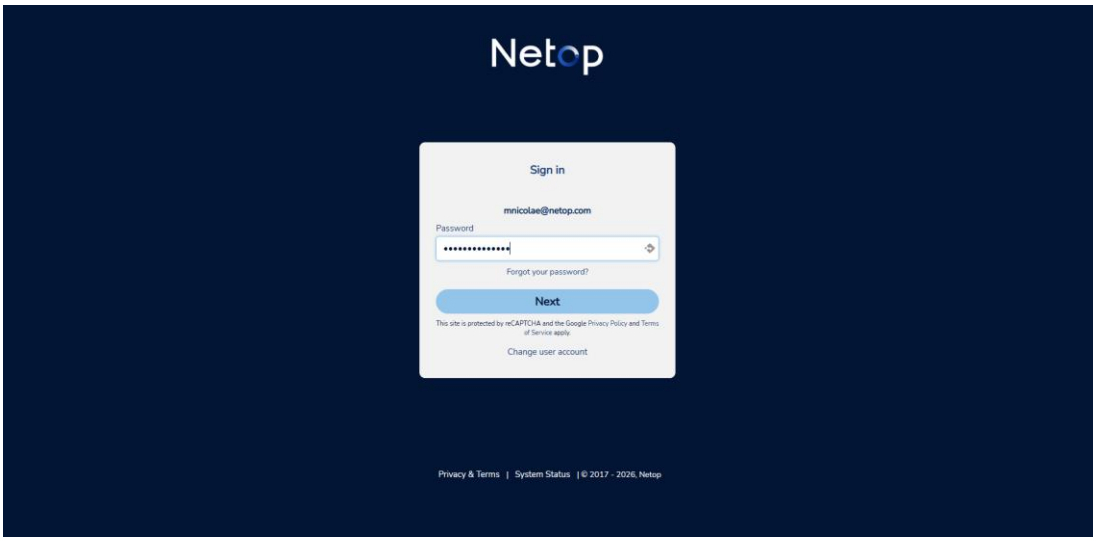
To log into the **Portal**, use the link and the credentials you used to set up the trial account:

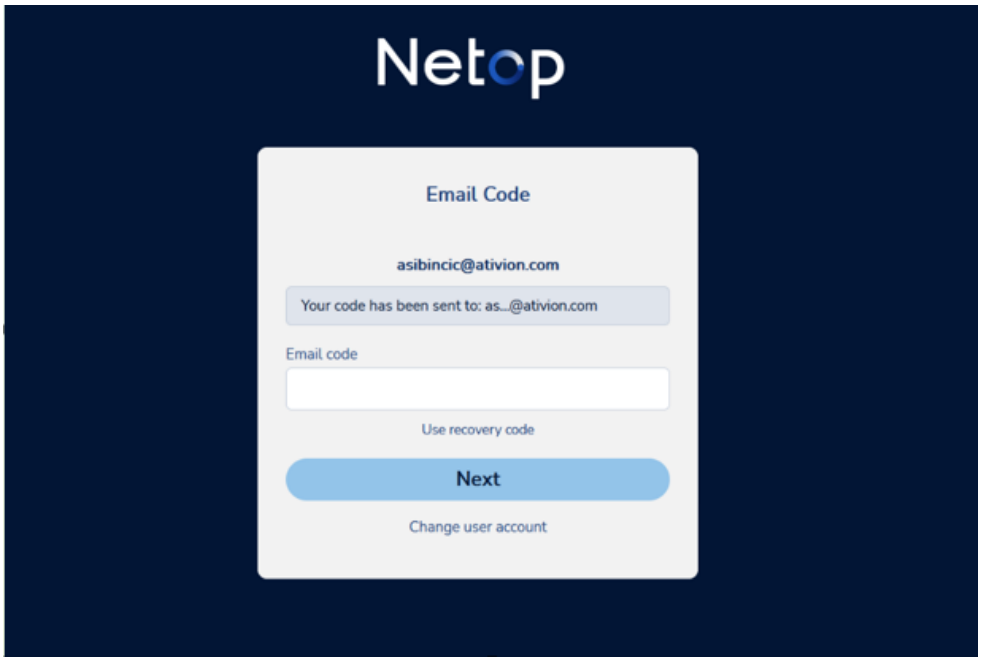
1. Specify the username and click on **Next**.



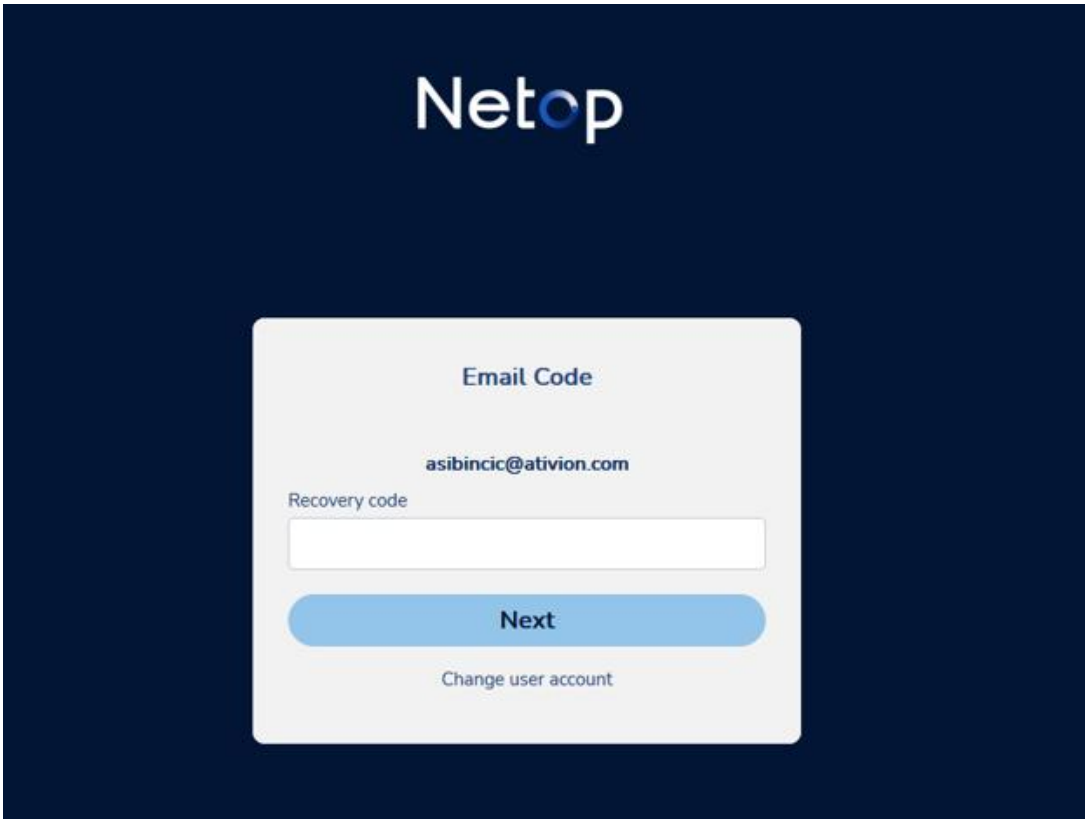
2. Specify the password and click on **Next**.

If **multi-factor authentication** is enabled for your account, it is necessary that you specify the code sent to you via email as a second factor of authentication in the **Portal**.





If you do not have access to your e-mail account, you can use the recovery codes to sign in.



Refer to the Generate recovery codes sub-chapter for details on how to generate recovery codes.

If **LDAP authentication** is set up for your account, authenticate in the **Portal** using the following username format: ***domain identifier\LDAP username*** and the domain password.

If **ADFS / Azure AD** is set up, the steps are the same as for **LDAP authentication**. The authentication is done on the customers' **ADFS / Azure AD** authentication page.

The **Portal** now uses the reCAPTCHA v2 invisible feature offered by Google as a means of protection against fraudulent attempts to logins, activities, spam, and abuse. The reCAPTCHA feature is designed to be friendly to humans. It uses advanced risk analysis techniques to differentiate humans and bots apart from each other in order to protect the Portal from spam.

2.1.1 Forgot Password

To reset your password, on the login page, specify your username and click on

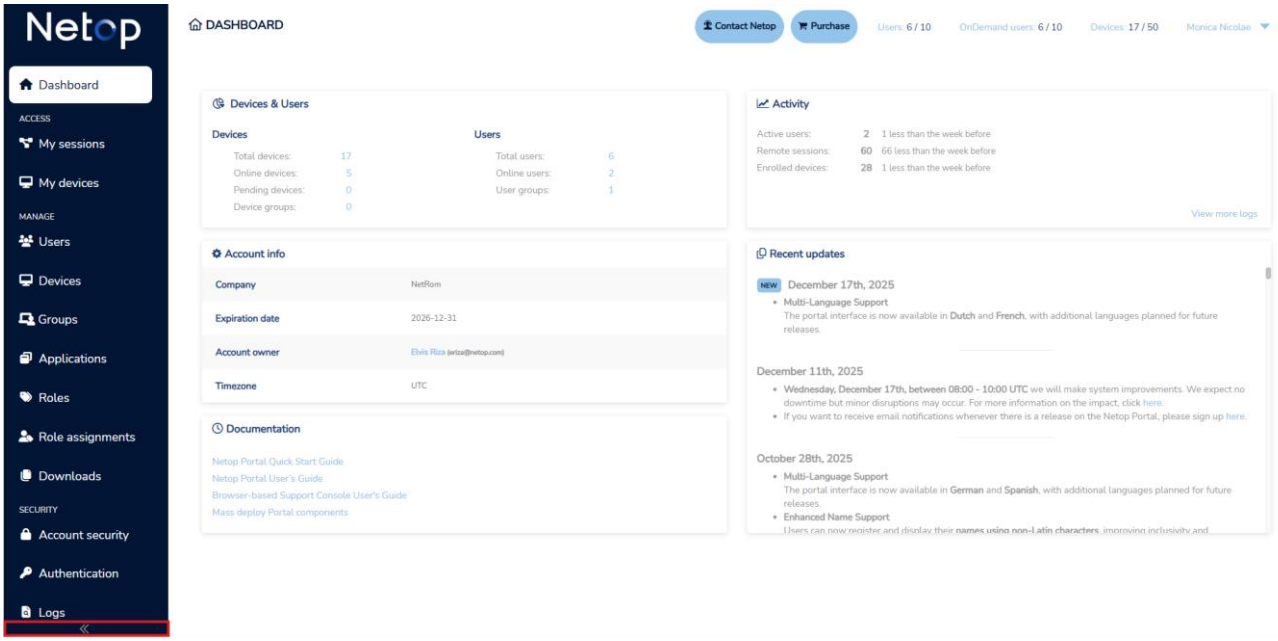
the Forgot your password? button. In the **Recover password** window, specify the email address associated with your **Portal** account and click on the **Send** button. You receive an email with instructions on how to change your password.

NOTE: The forgot password functionality does not work for **LDAP**, **ADFS** or **Azure AD** authentication. To recover your domain password, contact your system administrator.

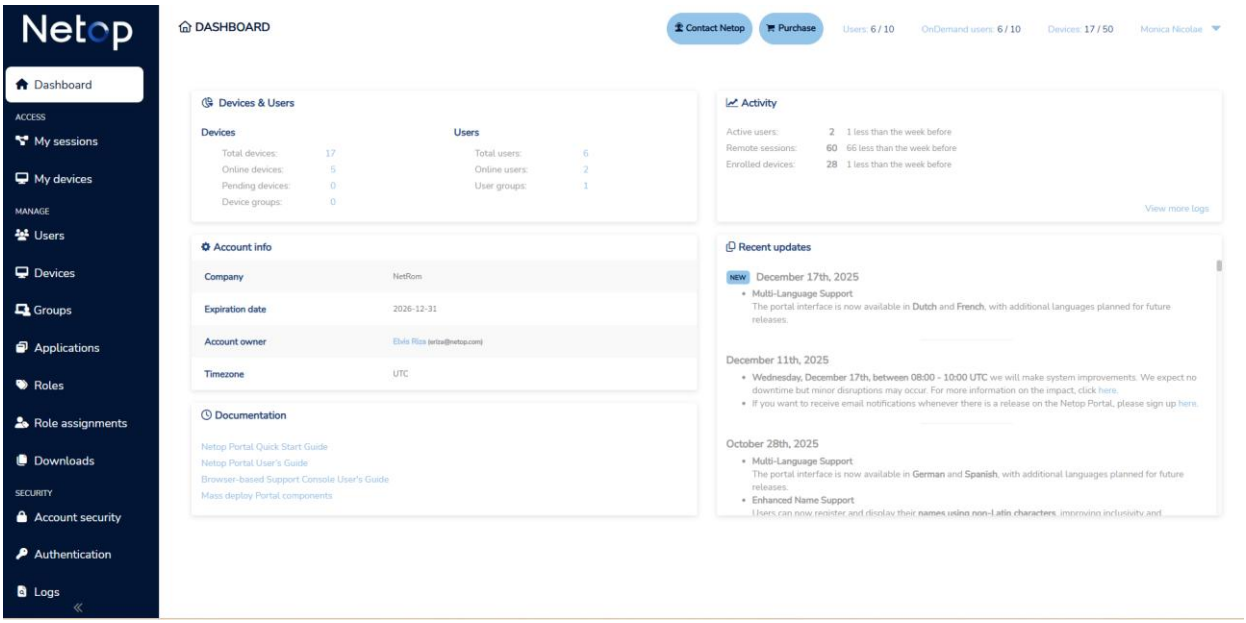
2.2 User Interface

The graphical interface has three main areas:

- **Menu sidebar (on the left)** - allows you to navigate through the **Portal**. The sidebar menu can be collapsed to increase the usable area of your display, by clicking on the collapse button that can be found at the bottom of the sidebar menu.



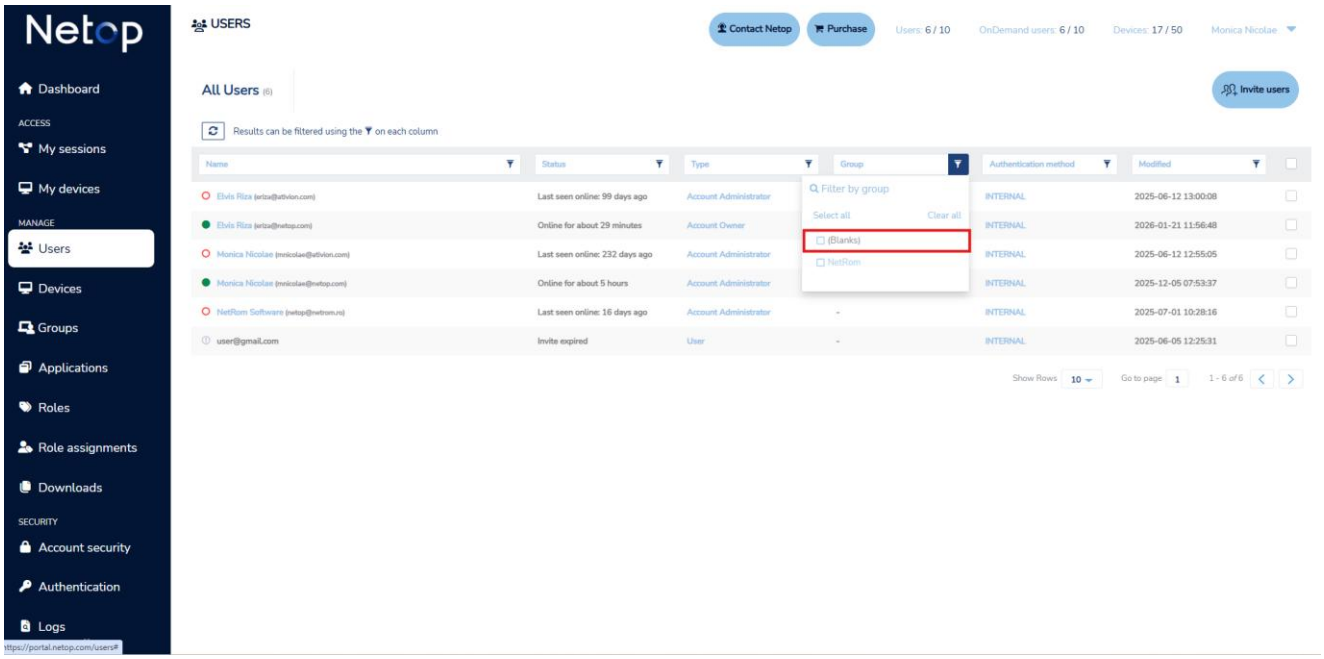
- **Title bar (on the upper side)** - allows you to perform general actions like **contacting support**, accessing the **My profile** page, **OnDemand** sessions, number of devices enlisted, number of users, and log off.
- **Content area (right of the menu bar)** - displays information such as devices and users, activity, account information, documentation, and recent updates.



2.2.1 Filter Information

You can filter the information displayed in the content area by using the filters available on each column header (in case a listing is displayed). Using the filter improves the ability to locate specific items within the listings.

Clicking on the **Filter** icon on a column header displays an advanced filter, which allows you to select the filter criteria.

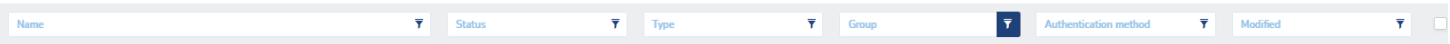


For example, you can use the **Blanks** filter option to help identify the users and devices that aren't part of a group.

NOTE: When you filter by device group, you only see the device groups that you have permissions for.

2.2.1.1 Multiple filters

You can set multiple filters to a listing.

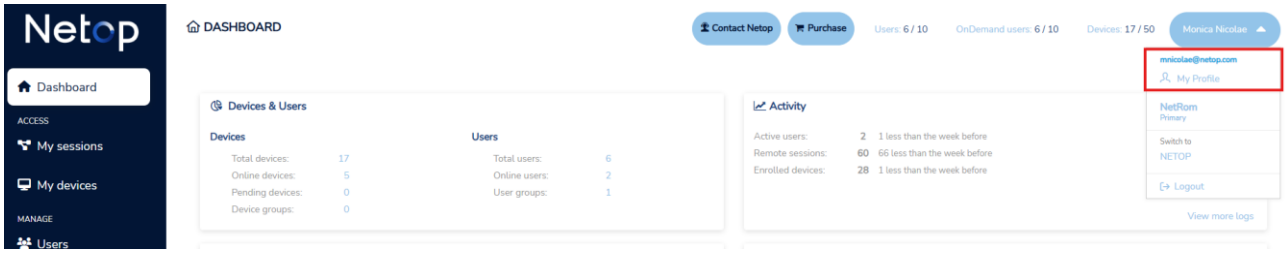


2.2.1.2 Reload listing and clear filters

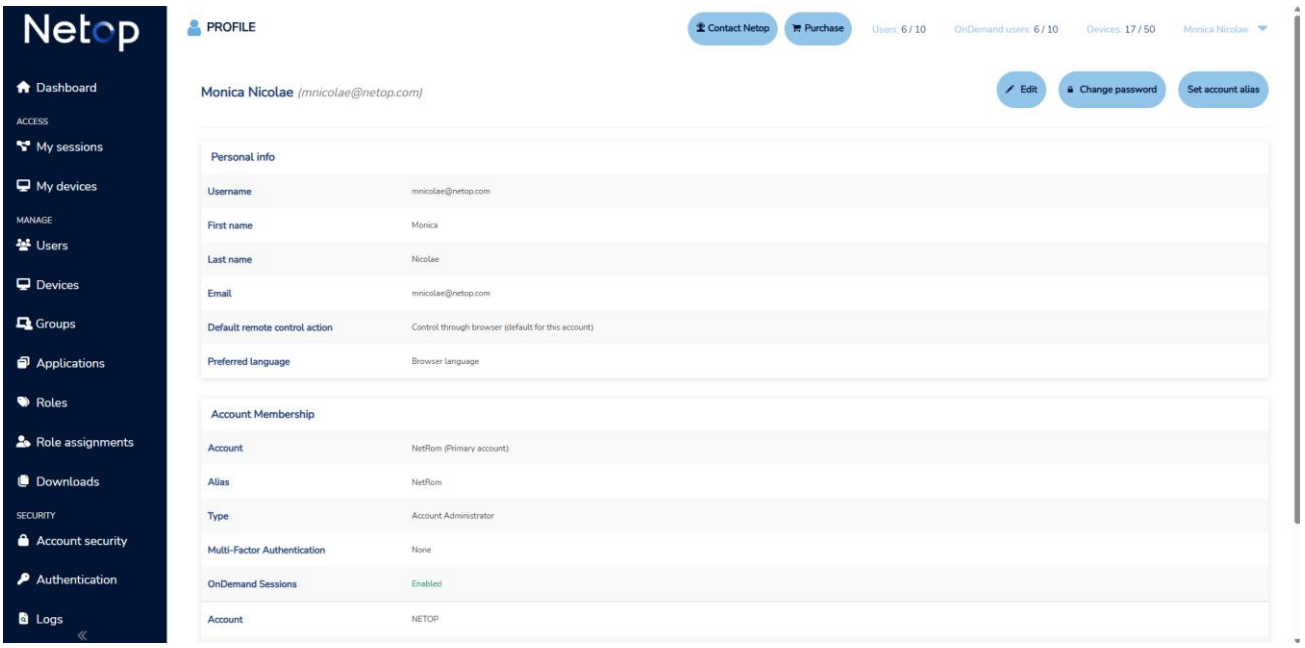
To remove a filter, from above the current listing, click on the filter you want to remove. You can also reload the current listing and clear all the filters.

2.3 User Profile

You can view your **Portal** profile details by clicking on the **Username** button in the title bar.



The **My Profile** tab displays information on the profile of the user currently logged in.



2.3.1 Edit Profile Details

You can change your profile details by clicking on the **Edit profile** button. The profile details become editable, except for the username which is non-editable.

Field	Description
First Name	User's first name.
Last Name	User's last name.
Email	The email address to which the user receives notifications from the **Portal** and the **multi-factor authentication** code (if enabled).
Email (MFA)	Enables or disables the multi-factor authentication for the User.
Default remote control action	Possible options: • Control through Guest • Control through browser The option that you set here as the default remote control action is the one that is displayed in the **My devices** tab when you want to start a remote control session with a device.

Make the profile updates that you want and click on the **Save** button to store the updates.

NOTE: **LDAP**, **ADFS** and **Azure AD** users cannot edit their **Portal** profile.

2.3.2 Change Your Password

To change your password, go to your profile and click on the **Change password** button.

NOTE: **LDAP**, **ADFS** and **Azure AD** users cannot change their password from within the **Portal**.

Specify and confirm a new password for your account.

A password is valid if it agrees with the following rules:

- minimum of 8 characters
- at least one uppercase letter
- at least one lowercase letter
- at least one numeric character

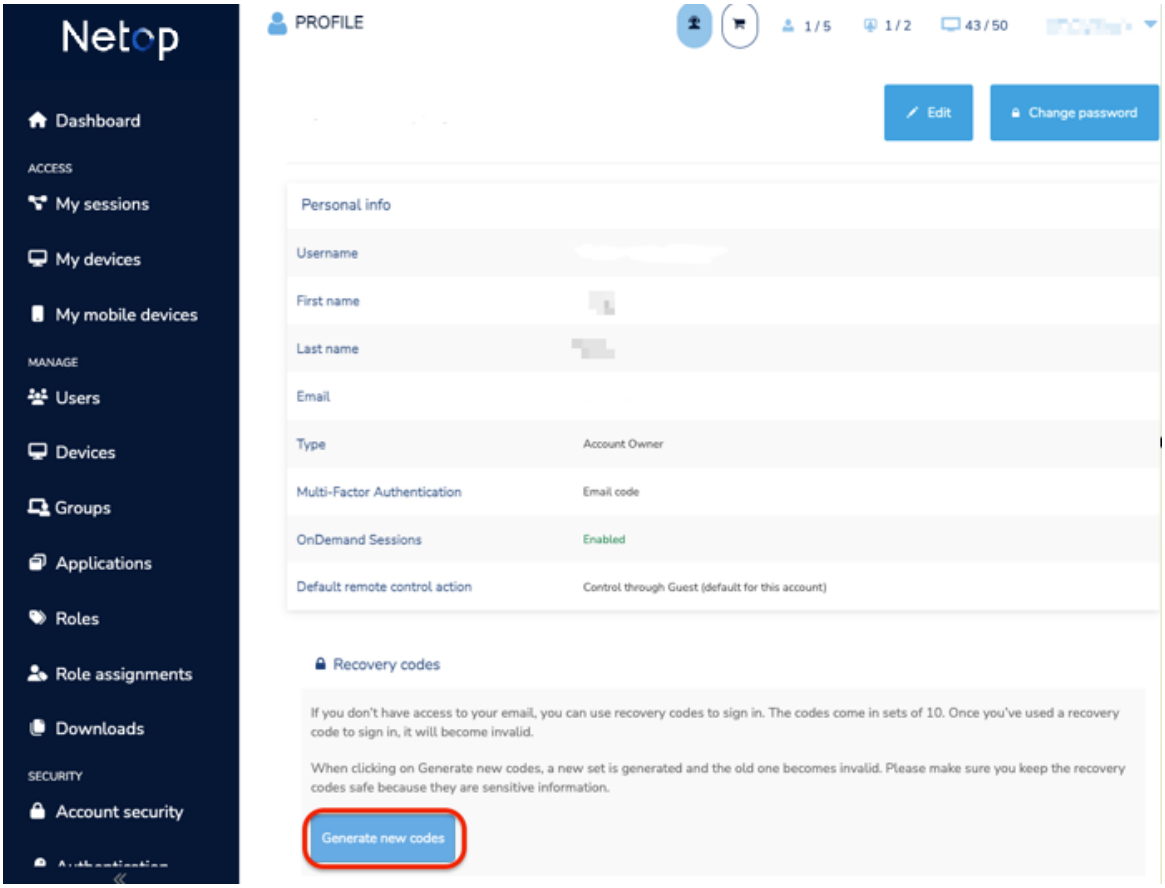
For the updates to take effect, click on the **Save** button.

2.3.3 Generate recovery codes

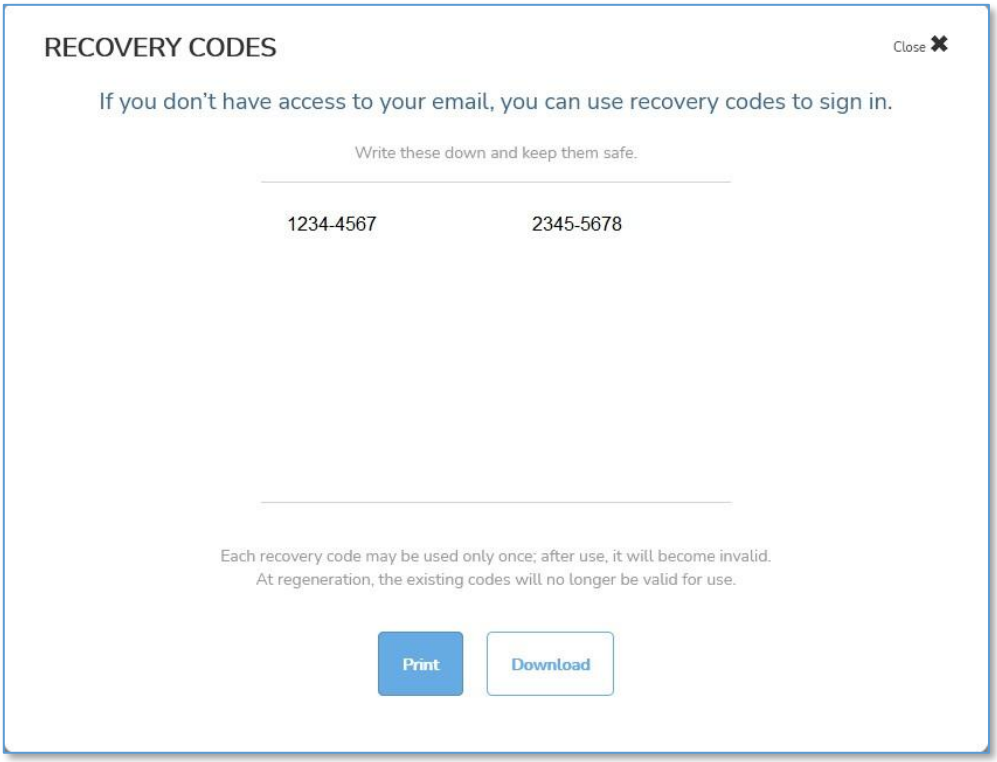
Recovery codes are used to log in to the **Portal** if you have **multi-factor authentication** enabled.

To generate the recovery codes:

1. Log in to the **Portal**.
2. Go to **My profile**.
3. Click on the **Generate new codes** button.



The recovery codes come in sets of 10. You can generate a new set at any point. When generating a new set of recovery codes, the previous set becomes automatically inactive. Also, after you've used a recovery code to sign in, the recovery code becomes inactive.



You can print the codes or download them on your computer. We recommend you keep the recovery codes safe due to their sensitive information.

3 How to remote control a device

The **My devices** and **My sessions** tabs list the online devices for which you have access permissions as defined by the applied role assignment(s).

Refer to the Roles and Role assignments sub-chapter for more information. If there is no device attached to the account, the options for installing the **Host** are displayed.

To remote control a device, users can:

- Use the **My devices** tab to connect to an installed **Host** through an installed **Guest (Support Console)** or by using the **Control through browser** option. For more information, refer to the My devices – permanent devices (attended and unattended) subchapter.
- Use the **My sessions** tab to connect to an **OnDemand Session** to temporarily access a Windows, macOS or iOS device through the browser option. For more information, refer to the **OnDemand Sessions** subchapter.
- Use the **My mobile devices** tab to connect to a **Host** mobile device. For more information, refer to the My mobile devices subchapter.

To connect to a **Host** device through the **Guest (Support Console)**, it is necessary that you download and install it on your device.

The **Guest (Support Console)** application can be installed on the following operating systems:

- Windows
- macOS
- Linux

Supported actions depending on the Host

Host operating system	Actions
Windows	- Remote Control - File transfer - Remote management (*) - Chat (*)
Linux & macOS	- Remote Control - File transfer

* **Guest** version 12.70 or higher is required

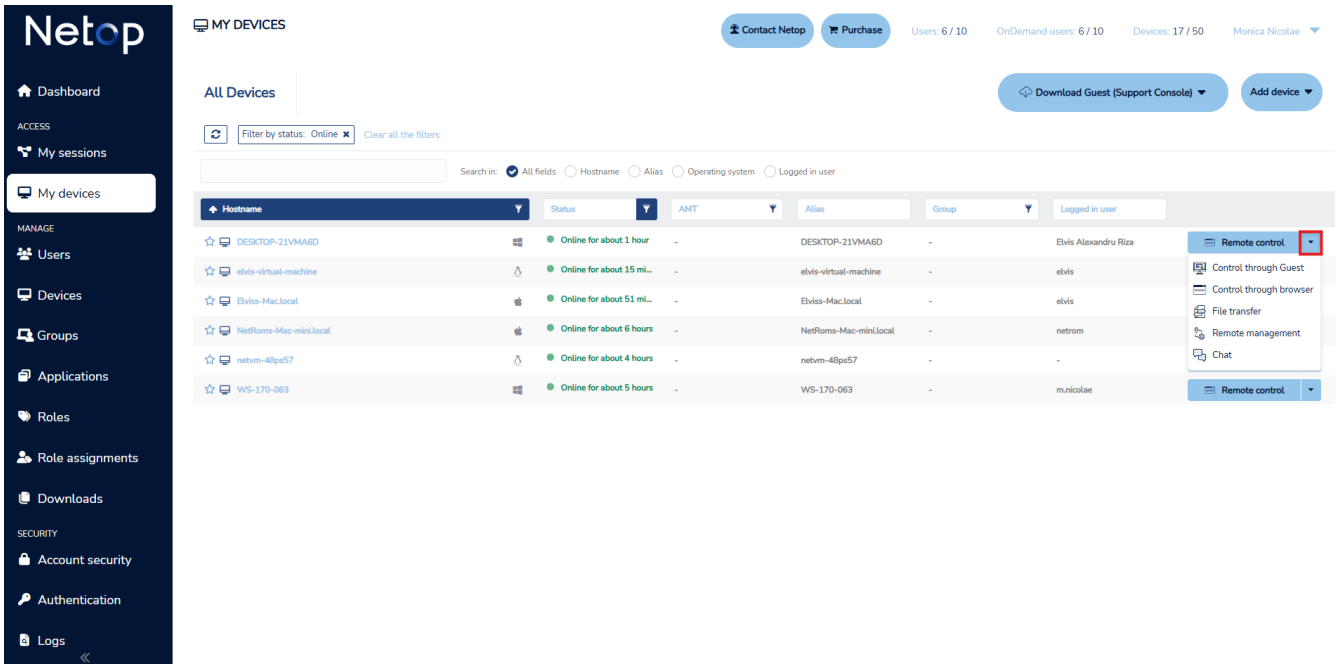
You can download the **Guest (Support Console)** application on your Windows device from the **My devices** tab.

3.1 My devices – permanent devices (attended and unattended)

Through the **My devices** tab you can:

- Remote Control a **Host** device through the **Guest (Support Console)**
- Remote Control a **Host** device through the browser
- Use the File transfer feature
- Use the Remote management feature
- Use the Chat feature

To view or use these options click on the dropdown menu button near the **Remote control** button.



NOTE: Using either the **File transfer**, **Remote management**, **Chat feature**, or **Control through Guest** option, launches the **Guest (Support Console) application**.

3.1.1. Target device – Host setup

3.1.1.1 Windows 7 or later

Depending on your needs, you can:

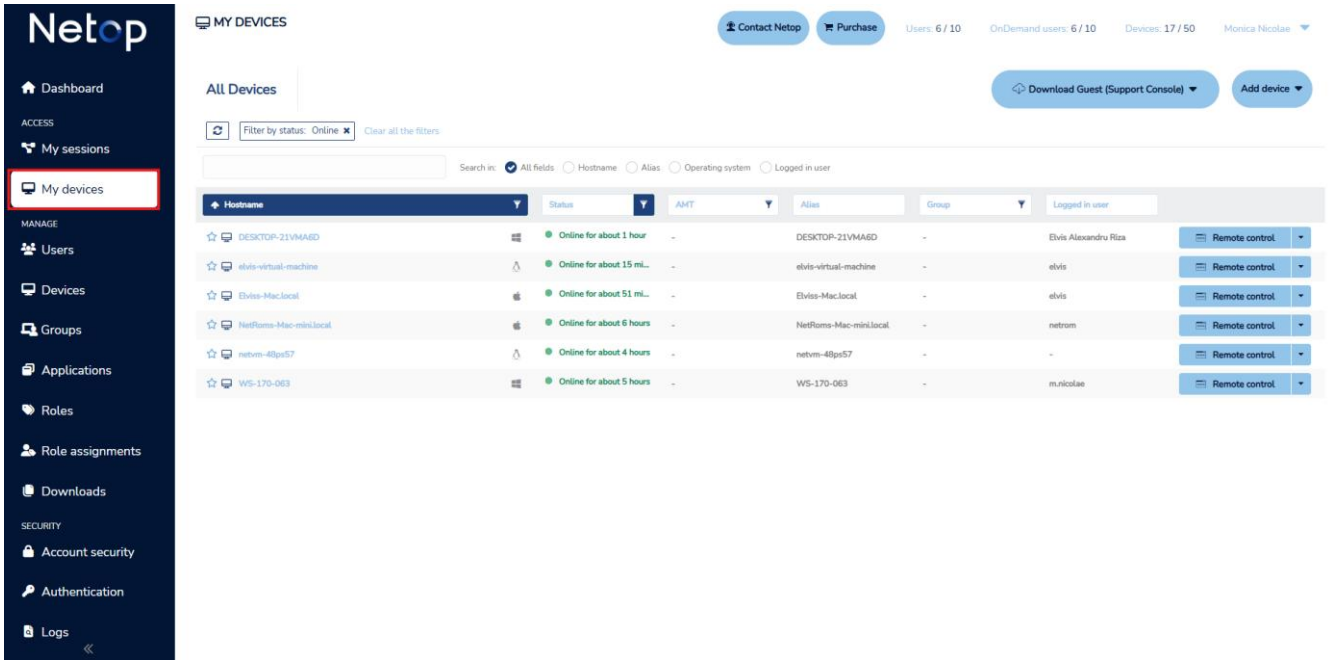
- Install the Host on the device that you are on

- Install the Host on another device
- Automatically install the Host using a mass deployment tool

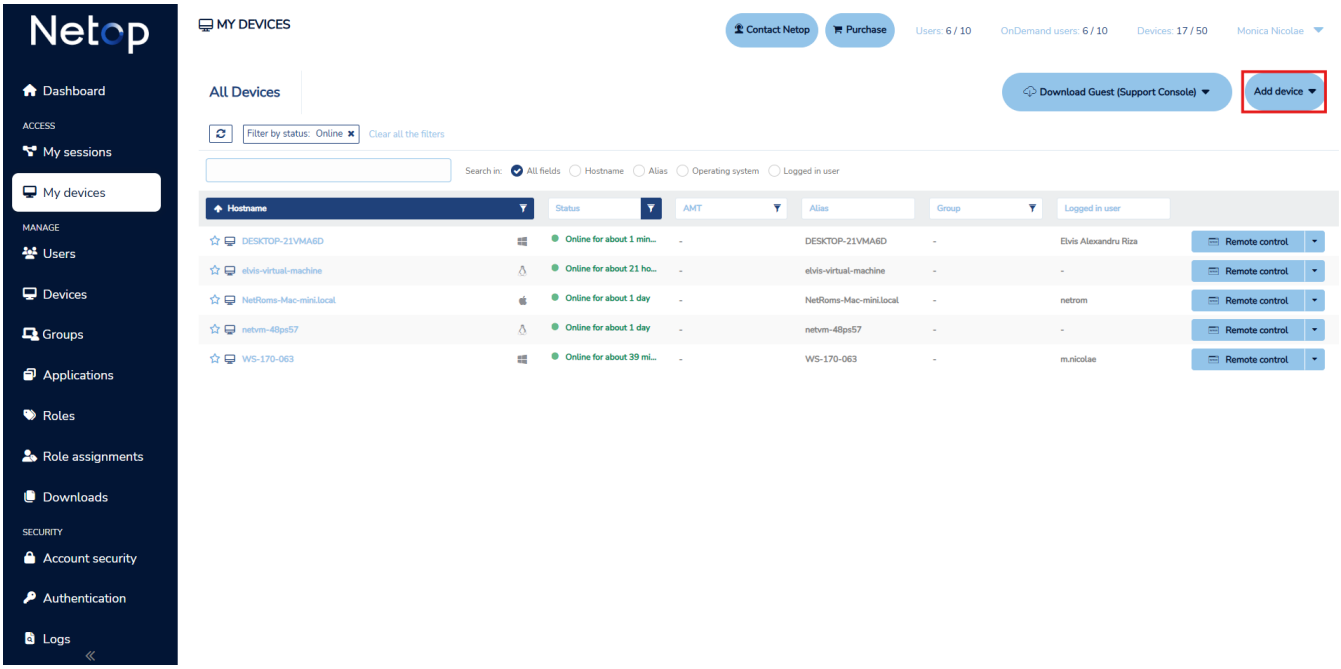
Install the Host on the device that you are on

To install the **Host** on the device that you are on, proceed as follows:

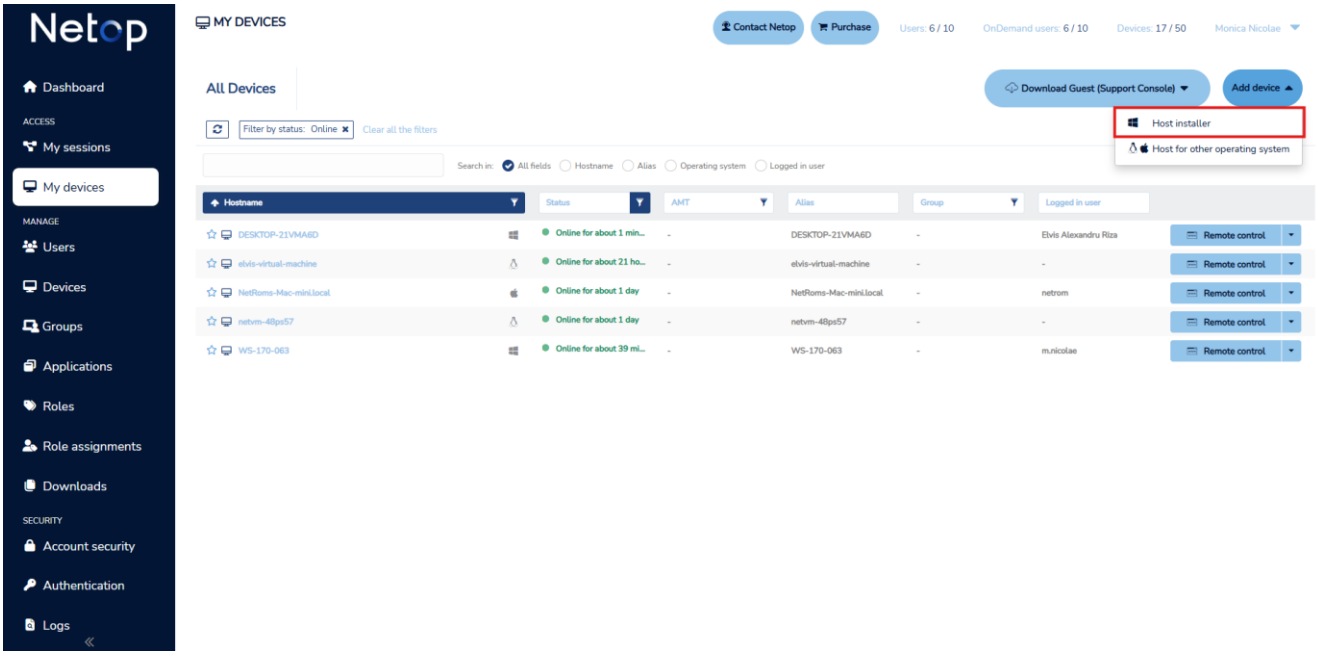
1. Go to the **My devices** tab.



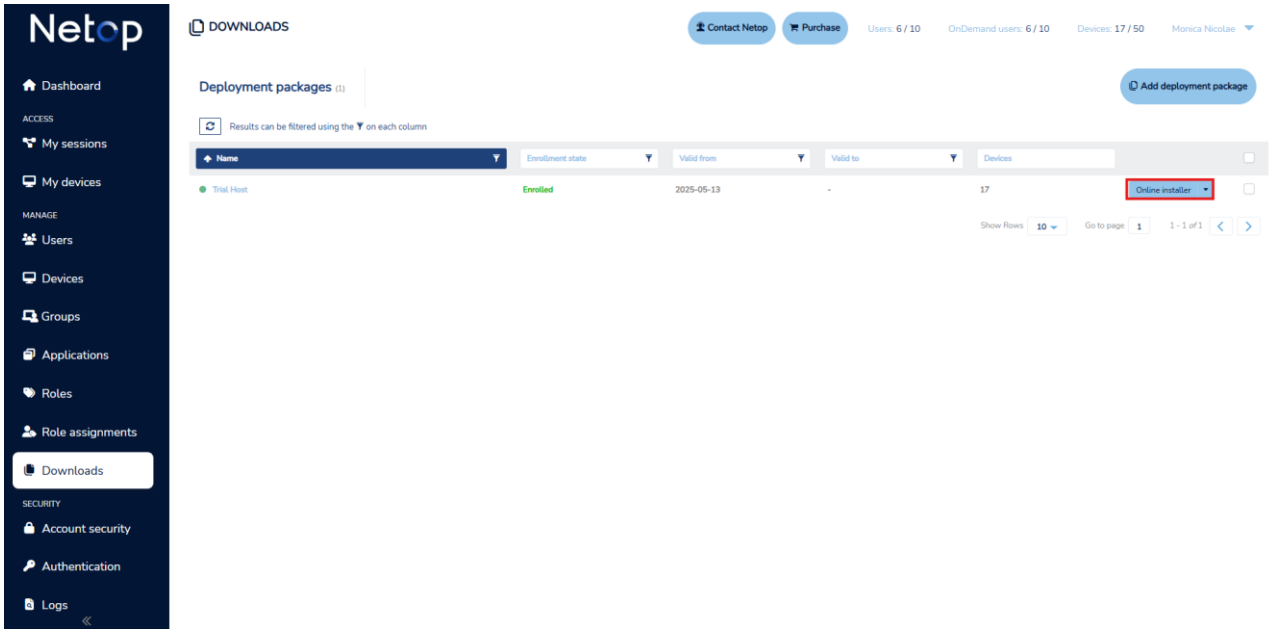
2. Click on the **Add device** button.



3. Click on the **Host installer** button.

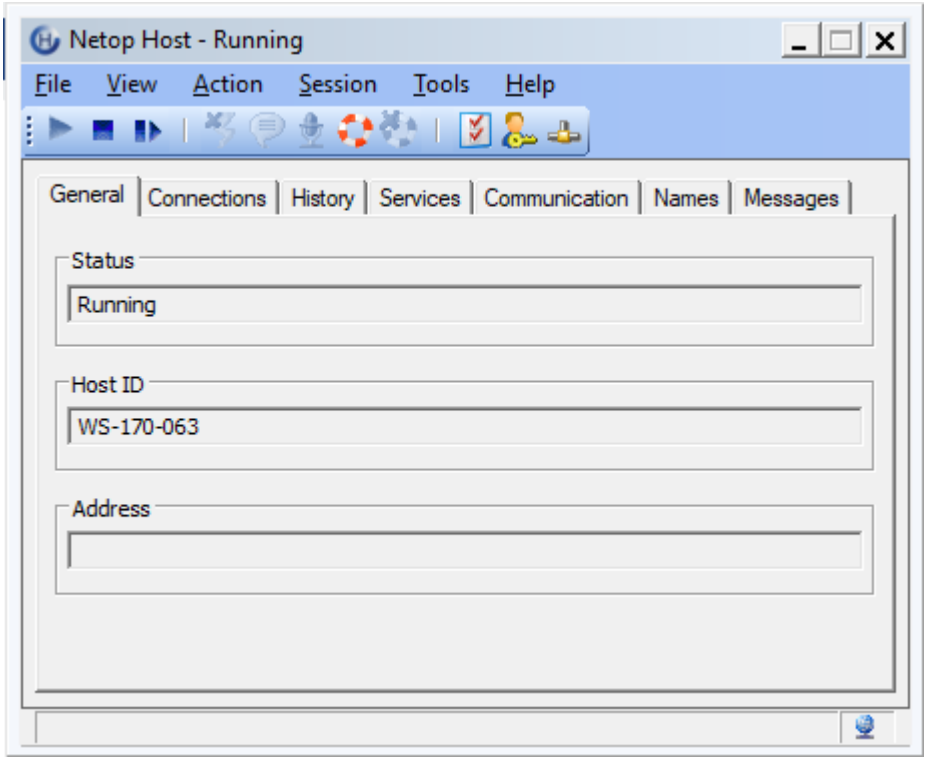


4. When there is more than one deployment package defined in your account, you are redirected to the **Downloads** page. Select the deployment package and click on the **Online installer** button for the download to start. Otherwise, the online installer is downloaded automatically.



5. Click on the downloaded executable file.
   The installation process begins, and it only requires that you accept the **A**cceptable **U**se **P**olicy.

6. When the installation process is finished, the **Host** automatically connects to the **Portal**.



3.1.1.2 macOS and Linux

3.1.1.2.1 macOS

The **Host** for macOS window contains most of the **Host** for Windows window elements, but the **Host** for macOS is limited in functionality when compared to the Windows version and the setup is organized differently.

The **Host** for macOS enables a remote **Guest** to connect through the TCP/IP, TCP/IP (TCP), HTTP, WebConnect, WebConnect 3 and the **Portal** communication protocols to remote control the **Host** for a macOS device, transfer files between the computers, and run a typed text chat session between the computer users.

Prior to installation, verify that your computer meets the technical requirements. For more information, refer to the macOS system requirements knowledge base article.

NOTE: To be able to install, make sure that the user logged on to the

computer is a local admin account. Using a domain account with local admin privileges does not work.

You can download and install the **Netop** for the supported macOS versions from the files found on the **Netop** download page.

Open the relevant `.dmg` file downloaded from the **Netop** website and double-click on the resulting `.pkg` file to display the installation wizard that guides you through the **Netop** installation. Accept the license agreement and specify the licensee name and the **Netop** license number when prompted.

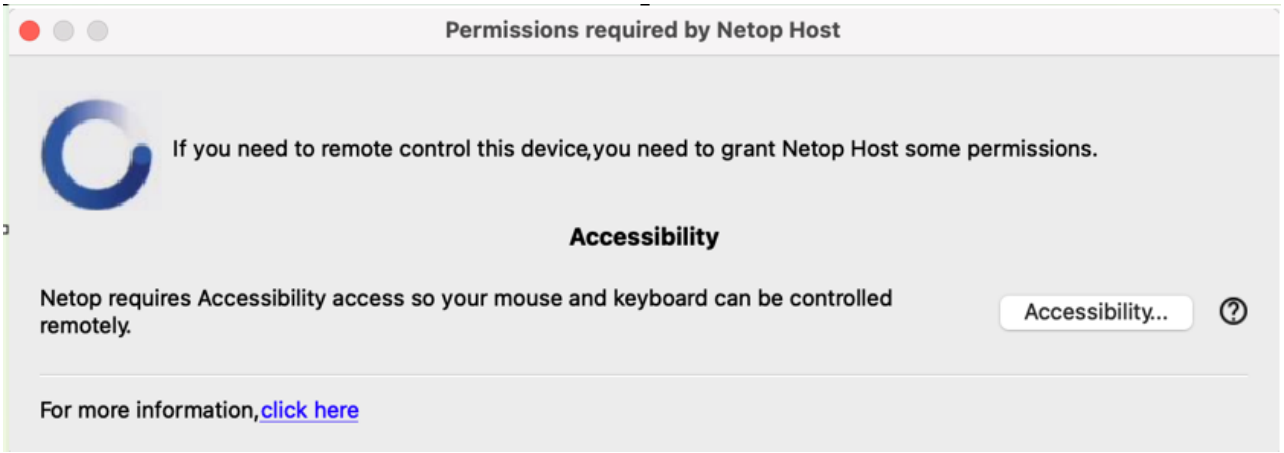
The **Host** includes the **Host** Program for macOS. The **Host** Program for macOS loads and initializes when the computer operating system starts.

To use the **Host** on macOS 10.14 and above, the **Host** requires the following permissions to be granted manually by the user:

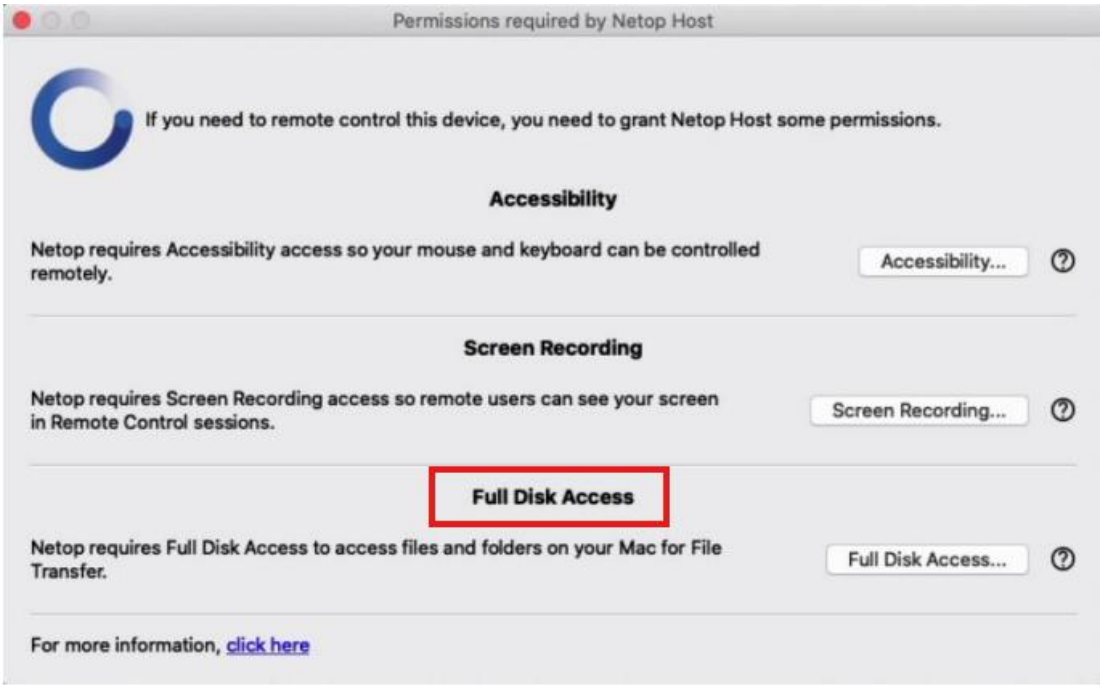
- **Accessibility**
- **Screen recording**

  NOTE: The **Screen recording** permission applies to macOS 10.15.

- **Full Disk Access**



NOTE: The **Host** only prompts you for the unset permissions. You are prompted to grant these permissions manually after you successfully install the **Host**, start or restart the **Host**.



To grant the **Screen Recording** permission, proceed as follows:

1. From the **Apple** menu, select **System Preferences**.
2. Click on the **Security & Privacy** icon.
3. Click on the **Privacy** tab at the top of the **Security & Privacy** window.
4. From the **Security & Privacy** window, select **Screen Recording**.
5. Click the lock to make changes.
6. To enable the **Screen recording** permission for the **NetopHost**, check the **NetopHost** checkbox.

NOTE: The **NetopHost** application is added to the list only after the first attempt to connect from a **Guest** to the **Host**.

To grant the **Full Disk Access** permission, proceed as follows:

1. From the **Apple** menu, select **System Preferences**.
2. Click on the **Security & Privacy** icon.
3. Click on the **Privacy** tab at the top of the **Security & Privacy** window.
4. From the **Security & Privacy** window, select **Full Disk Access**.

5. Click the lock to make changes.
6. To add the **NetopHost**, click on the **+** sign.

7. Browse for the **NetopHost**.
8. Click on **Open**.

The grant the **Accessibility** permission, proceed as follows:

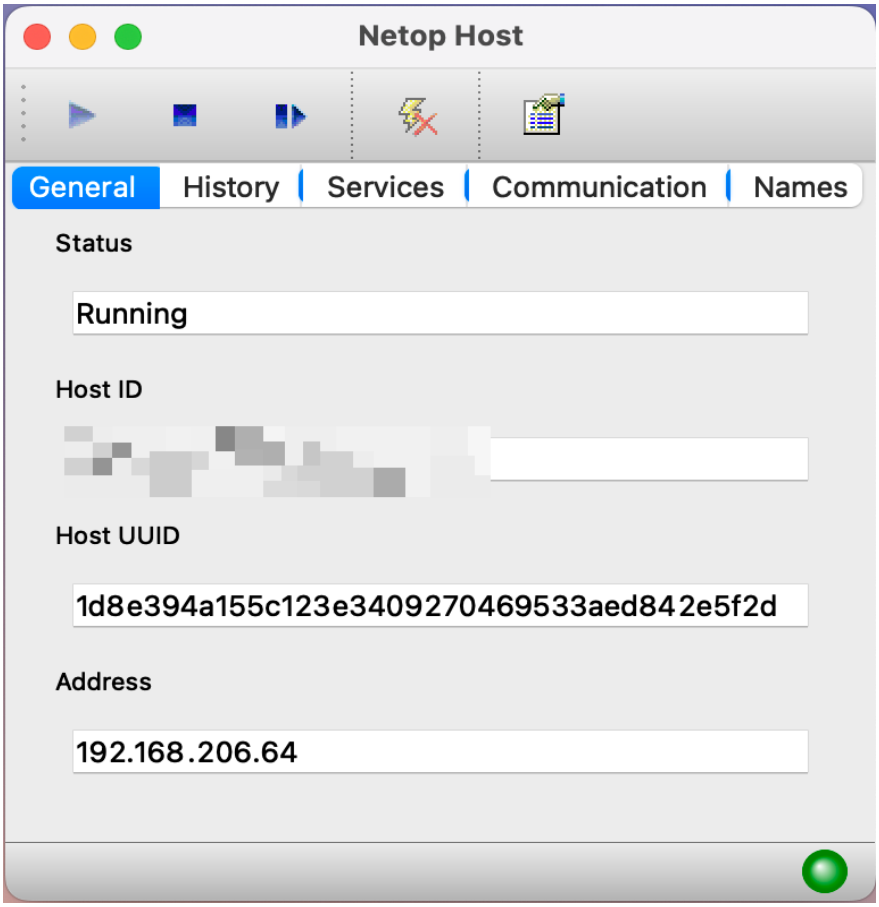
1. From the **Apple** menu, select **System Preferences**.
2. Click on the **Security & Privacy** icon.
3. Click on the **Privacy** tab at the top of the **Security & Privacy** window.
4. From the **Security & Privacy** window, select **Accessibility**.
5. Click the lock to make changes.
6. To enable the **Accessibility** permission for the **NetopHost**, check the **netophost** checkbox.

NOTE: You cannot add the **Accessibility** permission manually. If you remove the **Accessibility** permission for the "**netophost**", you cannot set it back again until you reinstall the **Netop Host**.

For more information on the macOS permission, refer to the following knowledge base article.

The **Host** GUI for macOS does not start when the **Host** Program for macOS loads.

If the **Host** Program on macOS loaded, select Applications/NetopHost to start the **Host** GUI for macOS.



To unload the **Host** GUI for macOS to hide the **Host** on the macOS window, exit the **NetopHost** application.

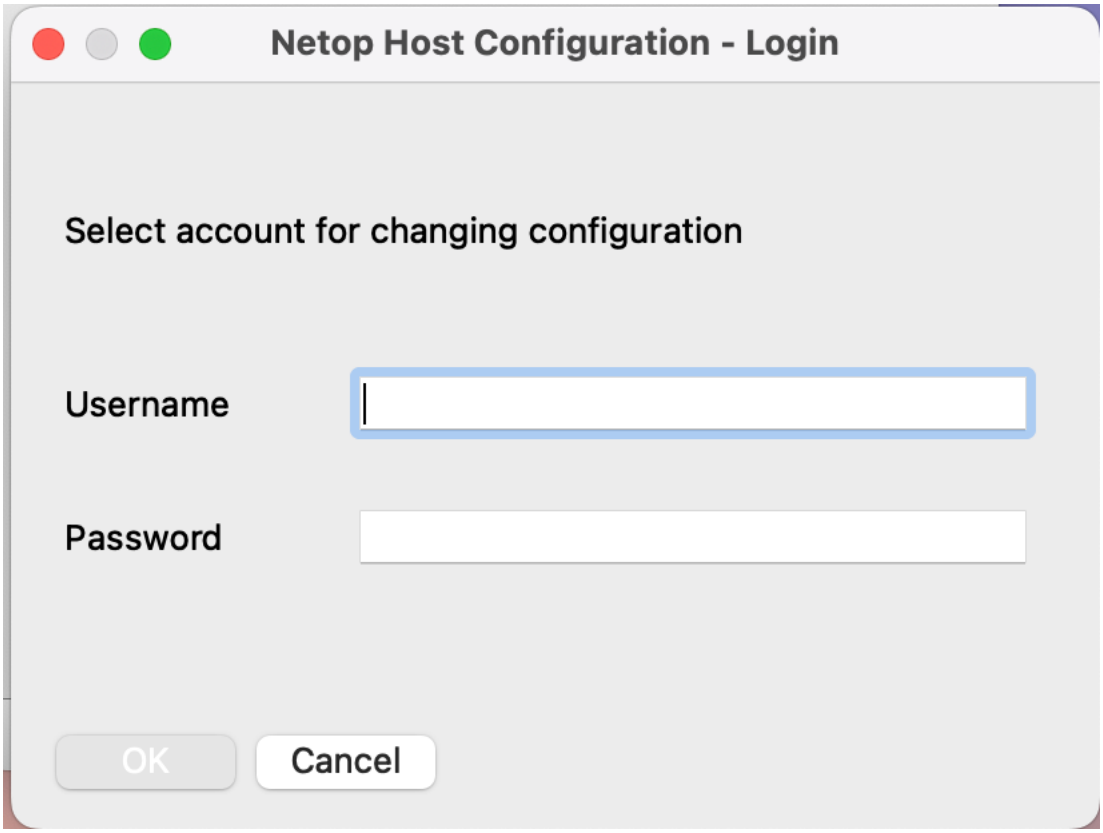
The **Host** for macOS window contains most of the **Host** for Windows window elements, but the **Host** for macOS is limited in functionality when compared to the Windows version and the setup is organized differently.

The **Host** for macOS enables a remote **Guest** to connect through the TCP/IP, TCP/IP (TCP), HTTP, WebConnect, WebConnect 3 and the Netop Portal communication protocols to:

- remote control the **Host**
- transfer files between the devices

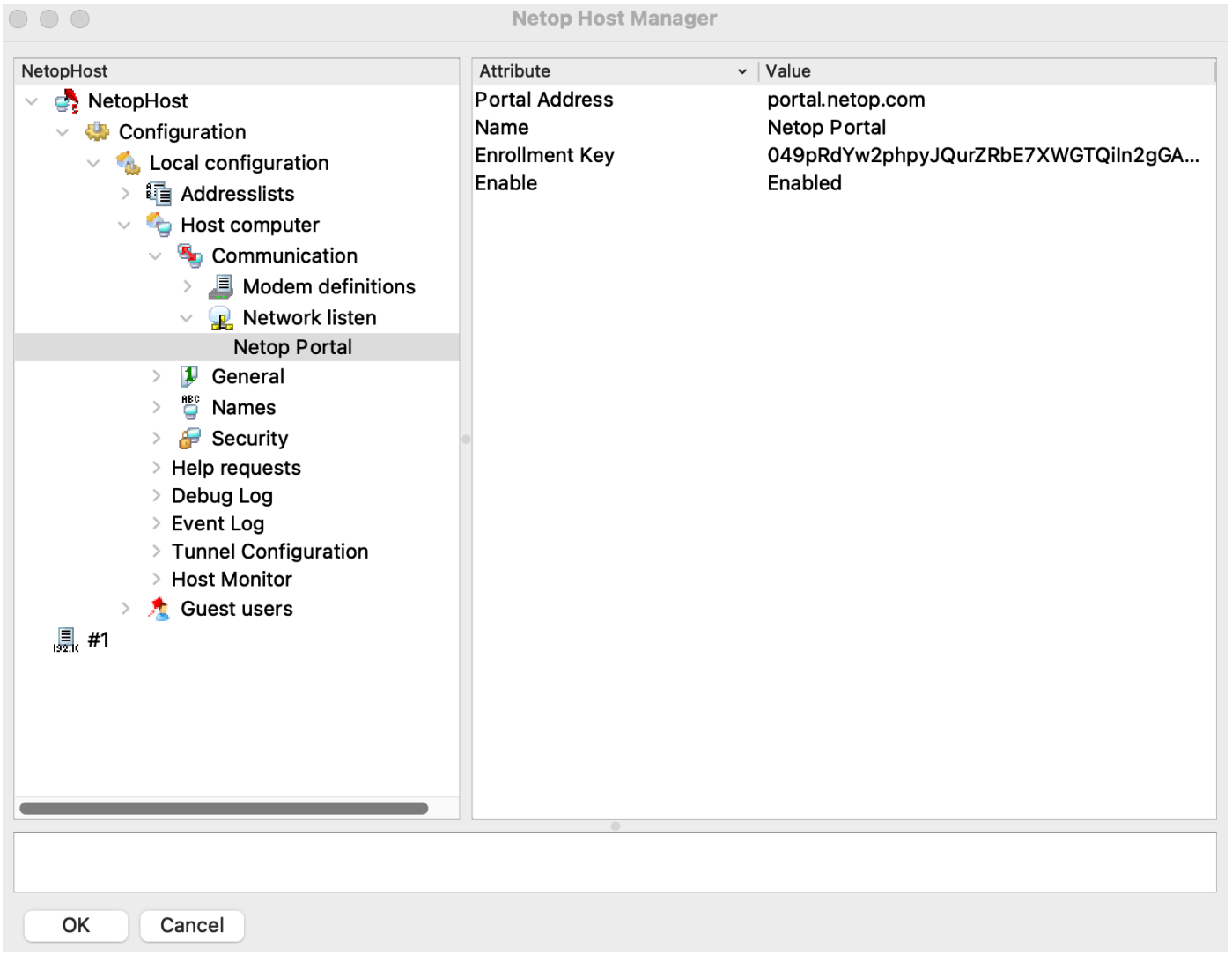
- run a typed text chat session between the computer users

To change the setup options of the **Host**, click on the **Options** button from the toolbar or on the **Tools** menu.



Specify a valid macOS username. To change the setup options of the **Host**, make sure that the user has the privileges to edit the `/Library/Application/Support/Netop/host/host.xml` file.

Type the corresponding password and click on the **OK** button. The **Netop Host Manager** is displayed.



3.1.1.2.2 Linux

The **Host** includes the following programs:

- **Netop Host Daemon** (`netophostd`) - The **Netop Host Daemon** runs when the computer operating system starts. A user with system user privileges can start and stop the **Netop Host Daemon**.
- **Netop Host Program** (`netophost`) – The **Netop Host Program** loads and starts when the **Netop Host Daemon** loads. If started, the communication is initialized enabling a **Netop Guest** to connect. A user can typically control the **Netop Host** Program from the **Netop Host GUI**.
- **Netop Host GUI** (`netophostgui`) – The **Netop Host GUI** displays the **Netop Host** graphical user interface. It does not automatically load when the **Netop Host Program** loads. A user can load and unload the **Netop Host GUI**.

NOTE: Only a user with system privileges can make changes to the **Host** program options.

The **Host** uses the following communication protocols to connect to the **Guest**:

- Portal
- Internet (TCP)
- LAN (TCP)
- UDP
- HTTP
- WebConnect and WebConnect3

The **Host** can be installed on a Linux device via:

- Software Installer
- Terminal

Before you install the **Host**, make sure that your computer meets the following minimum technical requirements. For more information, refer to the following knowledge base article.

To download the **Netop** application for the supported Linux distributions refer to the Netop download page.

- The download page includes separate installation or archive files for the **Guest** and **Host** depending on your Linux distribution.
- The archive file contains the following files:
  - `ca-certificates.crt`
  - `eula.txt`
  - `install.pl`
  - `installpubkey`
  - `netop.pub`
  - `netop-*.deb | netop-*.rpm` (based on the Linux distribution in use)

install.pl is a Perl script file that handles the installation process via the terminal.

To list all the parameters of the **install.pl** Perl script, use the following command:

```
install.pl --help
```

`install.pl` parameters table:

Function	Command
[--help]	Prints the help message and exits.
[--version]	Prints the version info and exits.
[--serial <serial>]	Installs **Netop Guest** | **Netop Host** with the **`<serial>`** number license key.
[--debug]	Turns debugging on.

[--license]	Prints the **Netop License**.
[--autoinstall]	Non-interactive installation assumes that you agree with the **Netop License**.

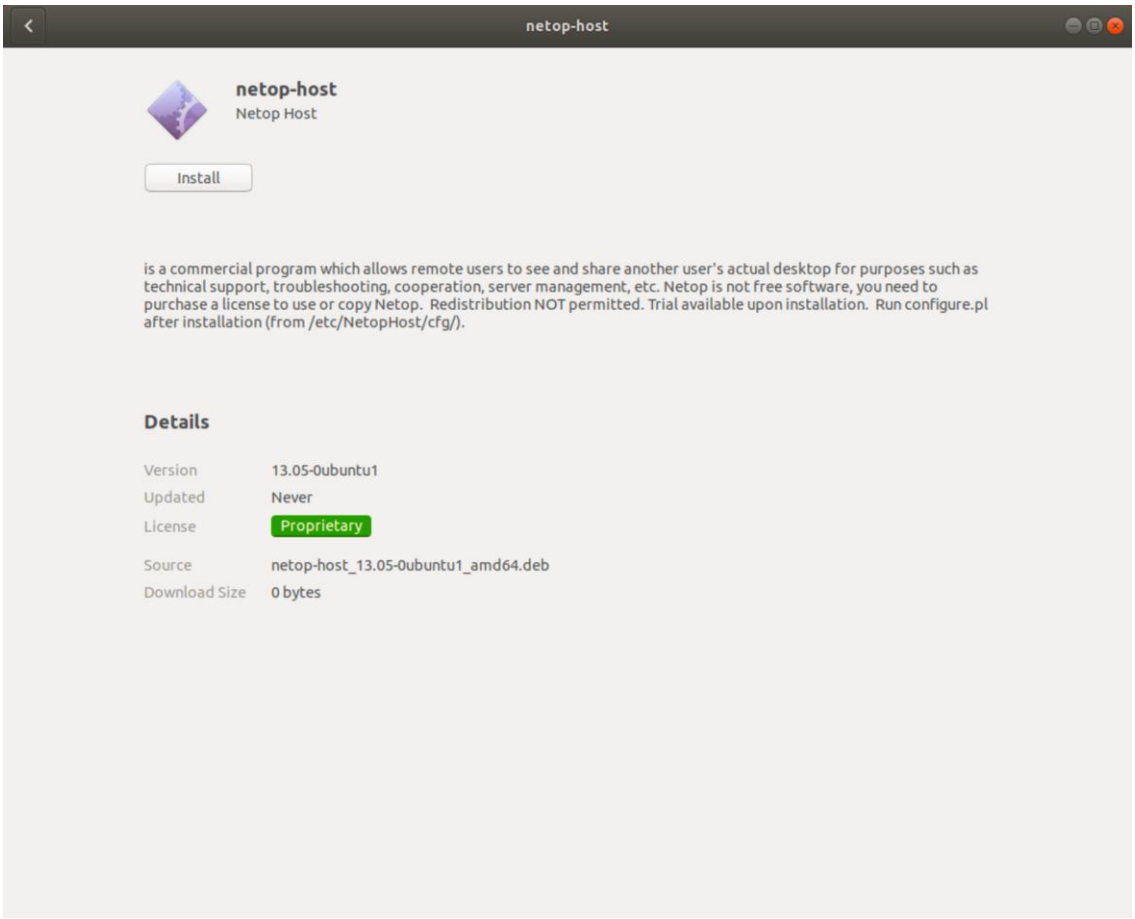
Example:

For the non-interactive **Host** installations, use the following command:

3.1.1.2.2.1 Install the Host via the Software Installer

To install the **Host** via the **Software Installer**, proceed as follows:

1. Go to the file path of the extracted **Host**.



2. Double click on the `netop-host_*.deb | rpm` installation file. The following window is displayed.
3. To install the **Host**, click on the **Install** button.
4. Specify the password for authentication.

3.1.1.2.2.2 Install the Host via the terminal

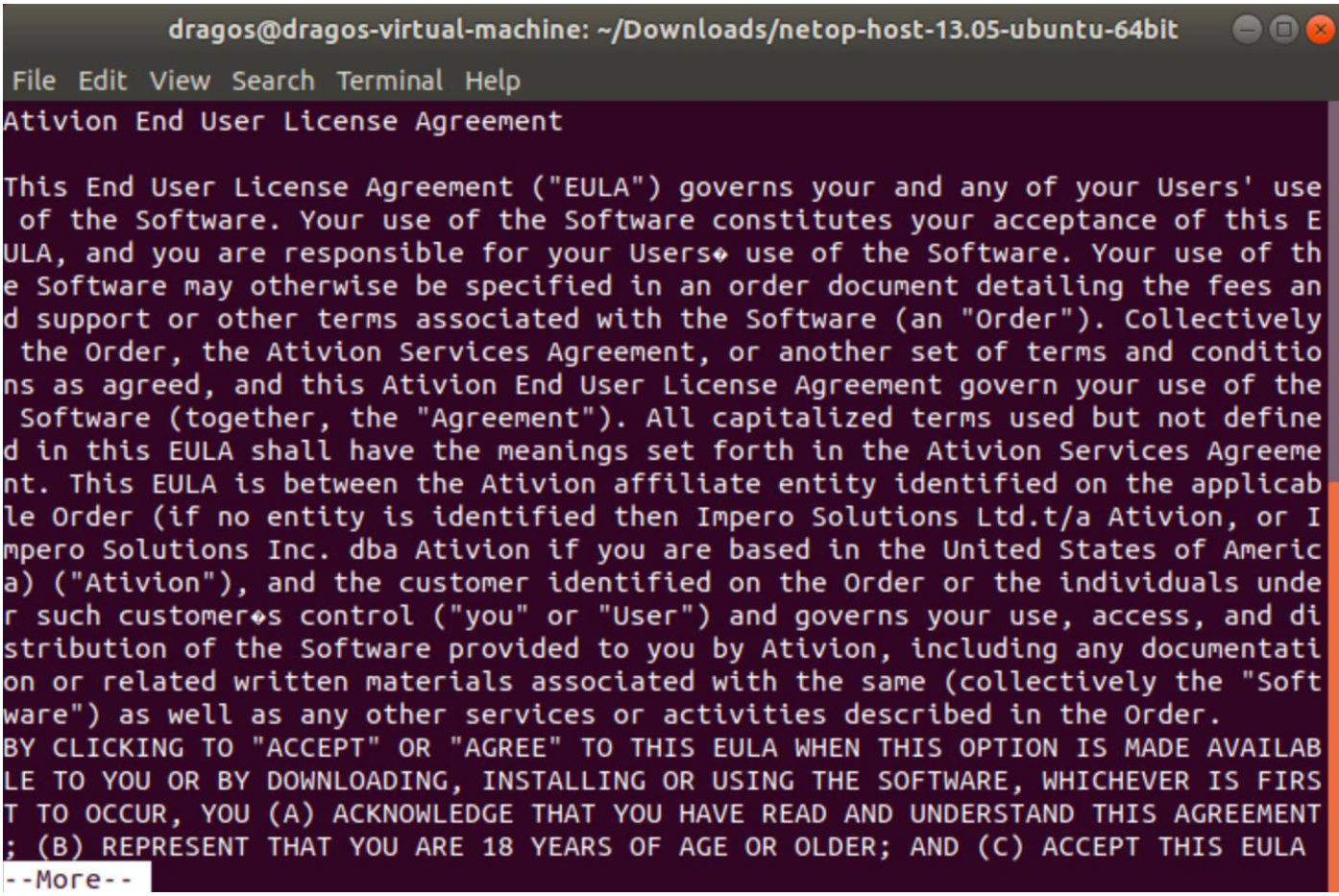
To install the **Host** via the terminal, proceed as follows:

1. Go to the file path of the extracted **Host**.
2. Open up a terminal window.

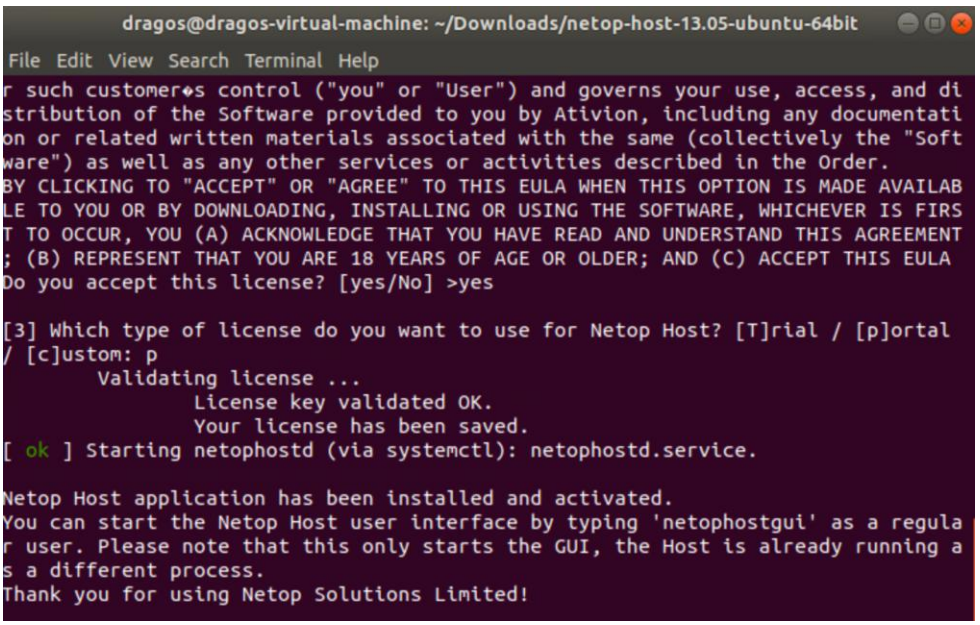
3. Use the following Perl script to initiate the installation process:

```
sudo perl install.pl
```

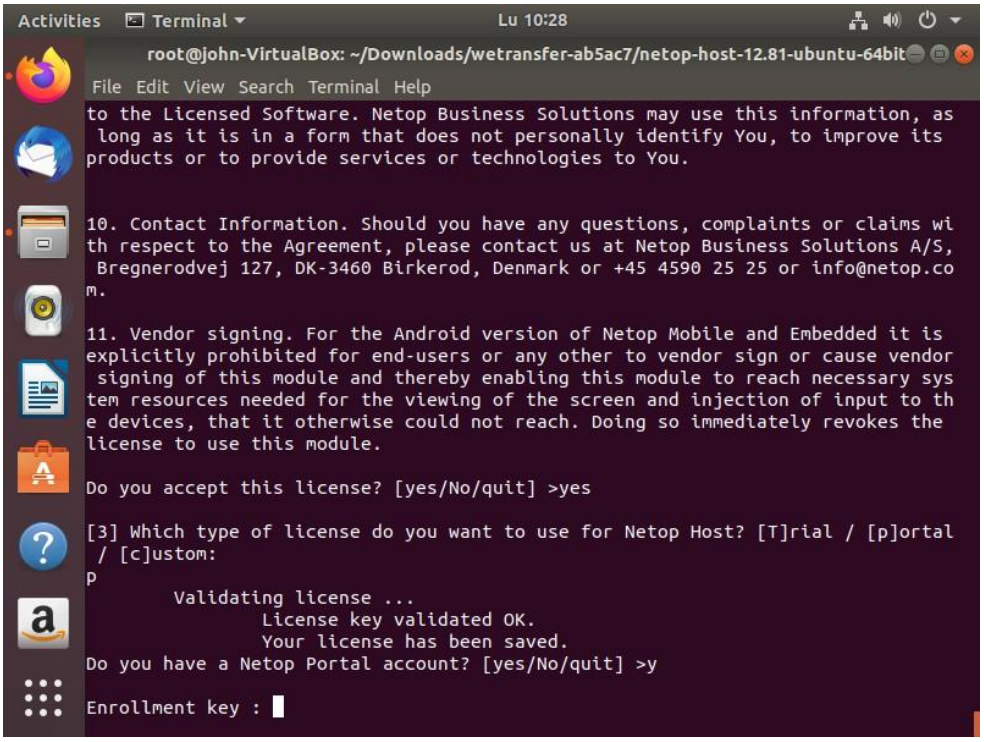
4. As part of the installation process, it is necessary that you accept the **A**cceptable **U**se **P**olicy.



5. Specify the type of license you want to use for the **Host**. The following options are available:
    a. **Portal** – all communication happens using the **Portal** (an **Netop Portal** account is required)
        i. Specify if you have a **Portal** account.



ii. Specify the enrollment key for your **Portal** account.



b. **Trial** – a **15**-day fully-featured trial.
   i. Specify if you have a **Portal** account.
   ii. Specify the enrollment key for the **Portal** account.
c. **Custom** – specify the required license after buying the product.
   i. Specify the License key for the **Host**.

NOTE:

- You are prompted to specify a license key.
- If you do not specify a license key, **Host** automatically installs itself in **Trial** mode.

ii. Specify if you have an **Portal** account.

iii. Specify the enrollment key.

NOTE: The **Linux Host** version 12.79 and above allow you to connect to a UNIX device through the **Portal** and **Windows Guest**.

3.1.1.3 Windows XP & Vista

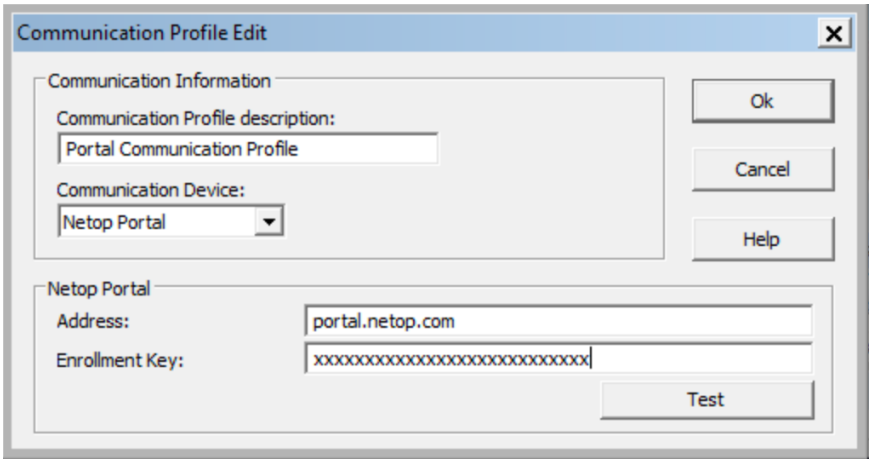
To install the **Host** on Windows XP & Vista, proceed as follows:

1. Go to the **Portal** under **Settings** > **Downloads** and click on the deployment package to retrieve the Enrollment key.

2. Download the **Host** online installer from the following link.
3. Install the **Host** online installer.

NOTE: You can manually install it on the device you use or use a mass deployment tool. Refer to the following knowledge base article for more information on how to mass deploy the **Host**

4. Configure the **Host** to use the **Portal** communication profile in the Setup wizard with the default address and the above enrollment key. You can also add a new **Portal** communication profile from **Tools** > **Communication profiles** > **New**.



3.1.2 Technician device

Technicians can use one of the following options to control a target device:

- Connect through Guest
- Connect through browser (Browser Based Support Console)

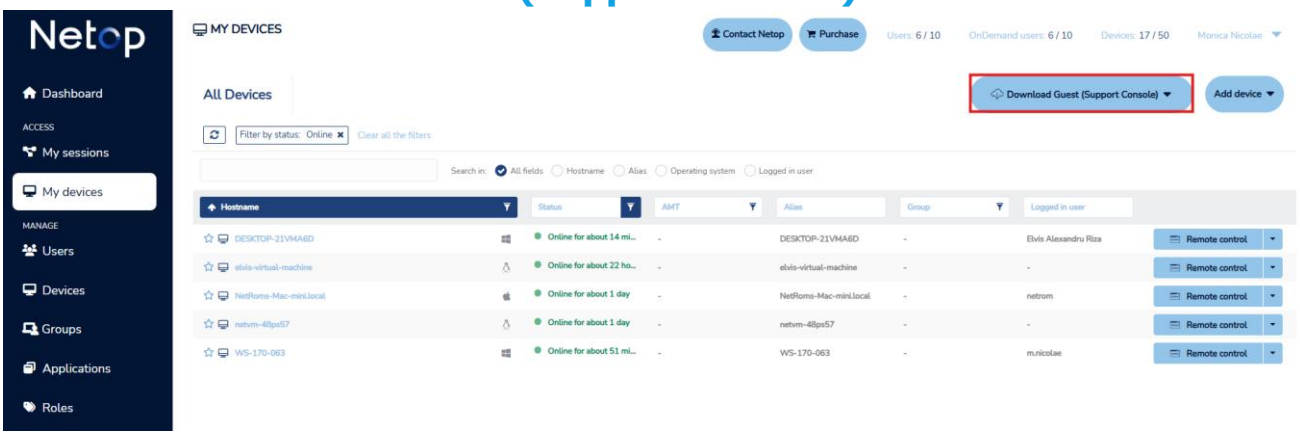
3.1.2.1 Connect through Guest

The **Guest (Support Console) application** is supported on the following platforms:

- Windows 7 & higher
- macOS
- Red Hat Enterprise 7.x / CentOS 7.x
- Ubuntu 16.04 / 18.04
- SUSE Enterprise 12.x

To download and install the **Guest (Support Console) application** on a Windows device, proceed as follows:

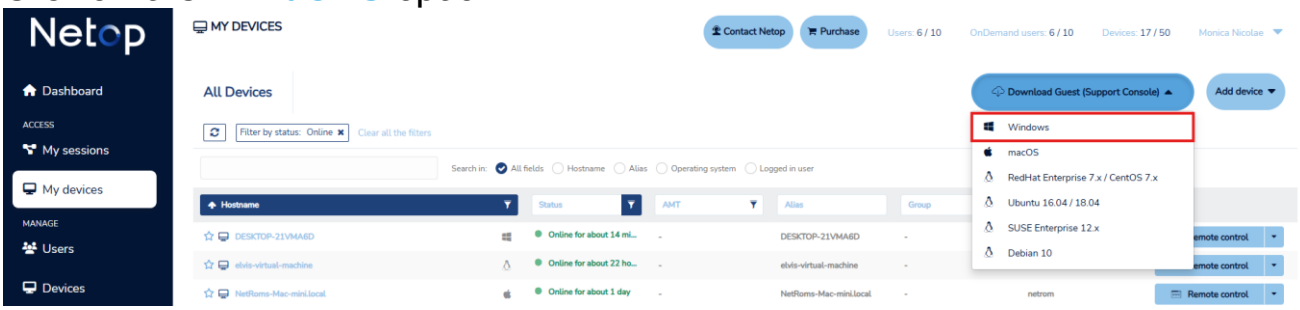
1. Go to the **My devices** tab.
2. Click on the **Download Guest (Support Console)** button.



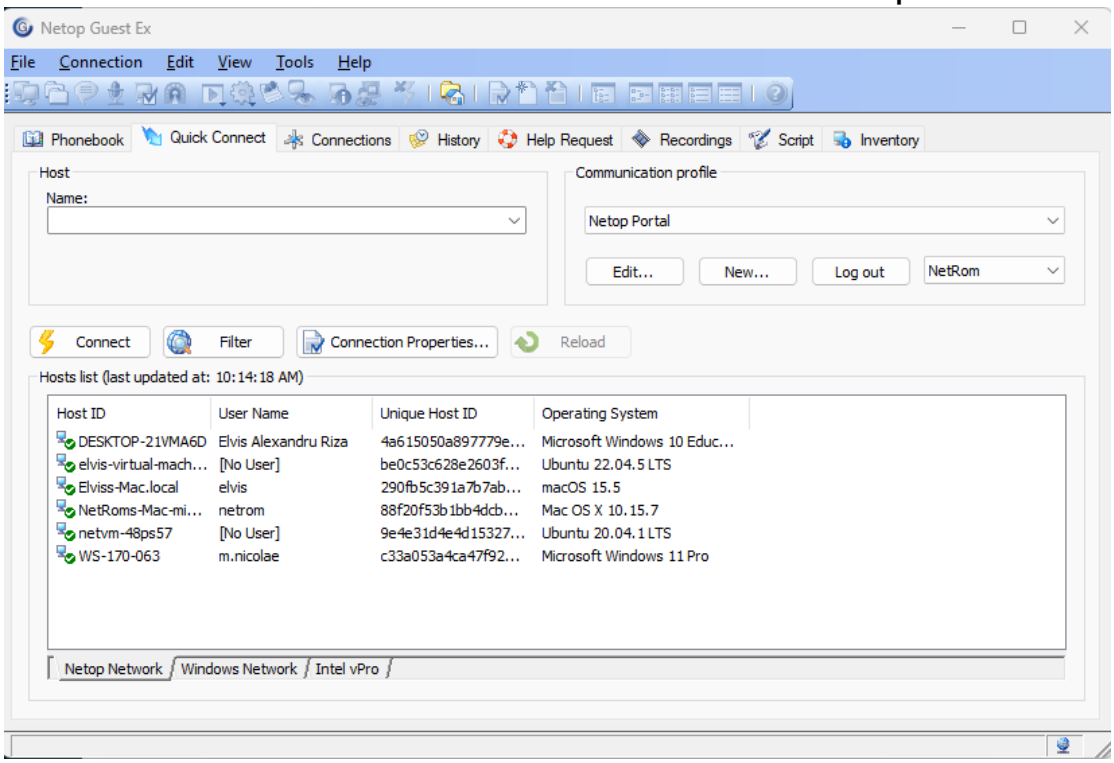
NOTES:

- Supported Windows versions: Windows 7 & higher
- Administrator permissions are required for the installation
- No license is required for the **Guest** (this is a **Portal** only installation, which means that the **Guest** only works with a **Portal** communication profile)
  When the **Guest** is installed, any previous **Guest** installations are removed from the machine together with their corresponding settings

3. Click on the **Windows** option.



4. Click on the downloaded executable file.
5. Click on the **Finish** button to finish the installation process.



For more information on how to download and install the **Guest (Support Console)** application on a macOS or Linux device, click on one of the following links:

- Linux Quick Install Guide
- macOS Quick Install Guide

3.1.2.2 Connect through browser (Browser Based Support Console)

To connect to a **Host** device, click on the **Remote control** button near the online device. The **Remote control** button launches the default remote control action that it has been set to.

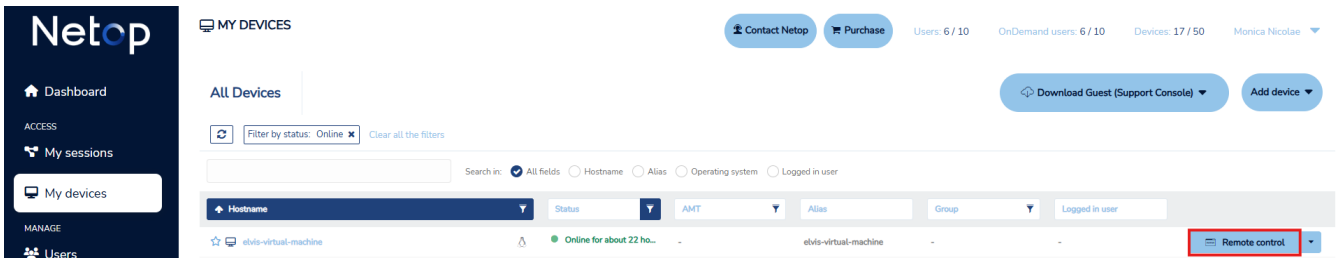
For more information on the **Browser Based Support Console**, refer to the Browser Based Support Console User's Guide.

The default remote control action for the **Remote control** button is set to the **Control through browser** option.

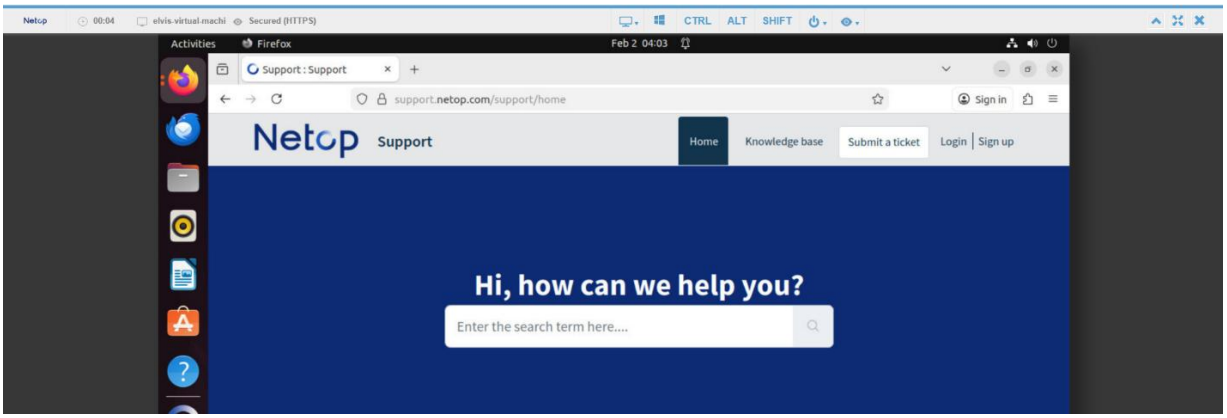
For more information on how to set the default remote control action, refer to the Set up the default remote control action subchapter.

To connect to the **Host** device, proceed as follows:

1. Go to the **My devices** tab.
2. Click on the **Remote control** button to connect the **Host** device.



If the **Host** is configured to use **Portal** access rights, no other authentication is requested from the user and the remote control session starts.



Once logged in, the remote support session provides access permissions as defined by the role assigned in the **Portal**.

Keys not captured by the operating system, or the browser are added to the top menu.

For Windows these include:

- Windows key
- CTRL
- ALT
- SHIFT

For macOS these include:

- Command key
- Control
- Option
- Shift

Selecting one of the keys within the console, and then pressing any key on

your keyboard, triggers the combination of those keys to be sent to the target device. Once the keyboard key is released, the button in the browser menu is unclicked.

To use a key (e.g., **SHIFT**) multiple times, double-click on the button and the key stays engaged. To release the command, click on the button again.

Using the console, you can send a variety of Windows commands using the power button options.

These include:

- Logout
- Lock
- Restart
- Shut down
- CTRL + ALT + DEL

If the **Host** has multiple monitors, while in a remote control session, you can change the host monitor to be displayed on the screen. Click on the **View** button from the main menu and selecting the desired monitor.

Other options that are available include:

- Toolbar minimization
- Close session button

3.2 OnDemand Sessions

In many environments, end-user computers have no administrative or organizational relationship with the help desk center from which they request help.

Help desk centers face three major challenges to offer service to these end-user computers:

- connectivity problems through end-user firewalls
- software maintenance
- licensing issues

The **Portal** includes the **OnDemand Sessions** feature, which offers help desk centers remote control of Windows-based devices across the Internet without pre-installing software or configuring firewalls. Furthermore, licensing depends solely on the number of help desk employees or supporters – and not the number of end-users.

The **OnDemand Sessions** contains the **Browser Based Support Console**, a downloadable **Netop OnDemand** application, and the connectivity and role-based access provided by the **Portal**. Technicians can connect to the target **Host** device, by clicking on the **Start session** button from the **My sessions** tab.

OnDemand Sessions are well-suited to the vast and fast-growing market of Internet Service Providers, telephone companies, outsourced help desks, and call-centers.

The **Portal** allows a support technician to define **OnDemand Sessions** and to share the session details with someone else, to view or control their device. This can be done without installing anything on the remote device, by running a single-use and disposable **OnDemand** application on the device, when necessary.

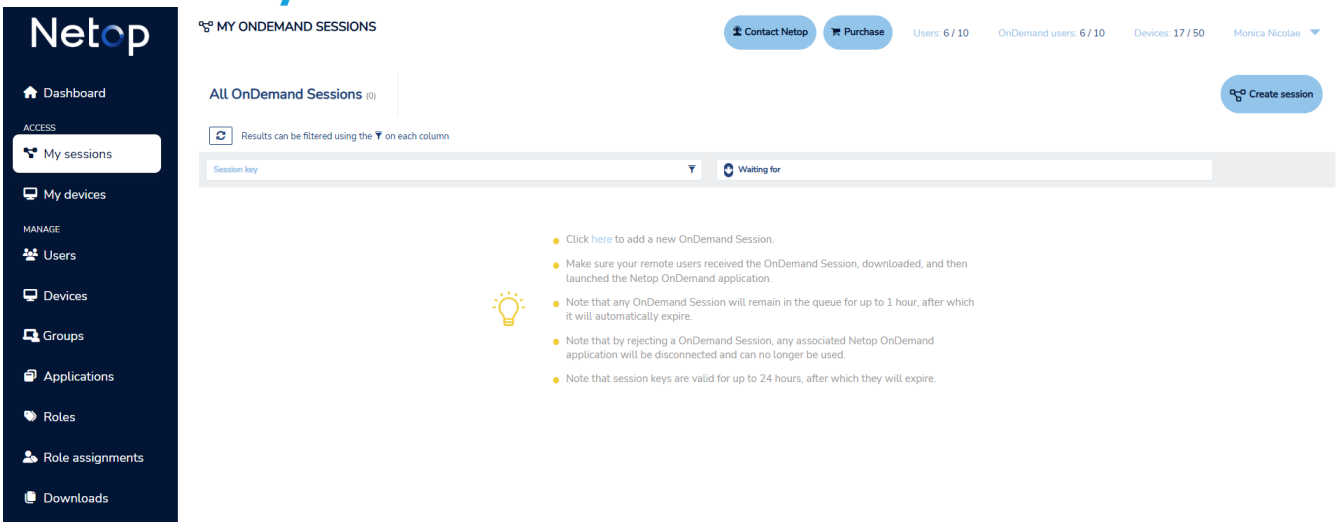
The **OnDemand Sessions** are valid only for one remote connection from the support technician to the device and are deleted automatically after the connection is closed.

NOTE: If you have an incompatible **OnDemand** client (i.e., you do not have the latest version of it) you are requested by the **Portal** to update it to the latest version.

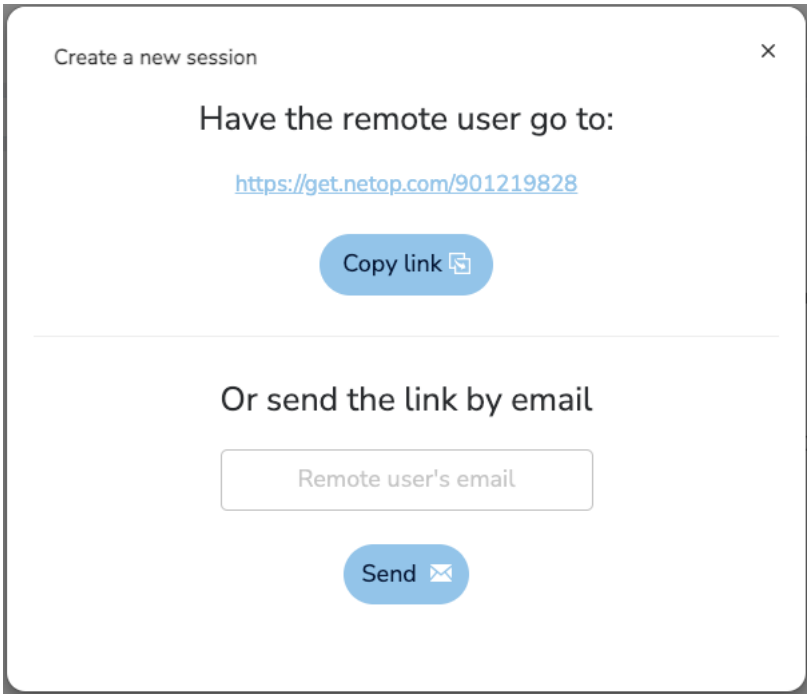
3.2.1 Browser Based Support Console – OnDemand Sessions

To create a new **OnDemand Session**, proceed as follows:

1. Access the **My sessions** tab from the menu on the left.

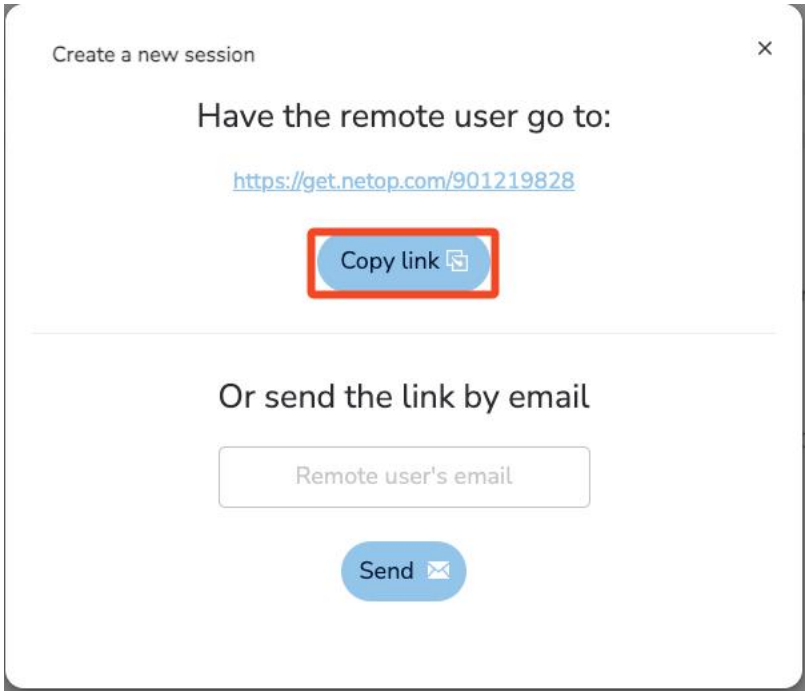


2. Click on the **Create session** button.

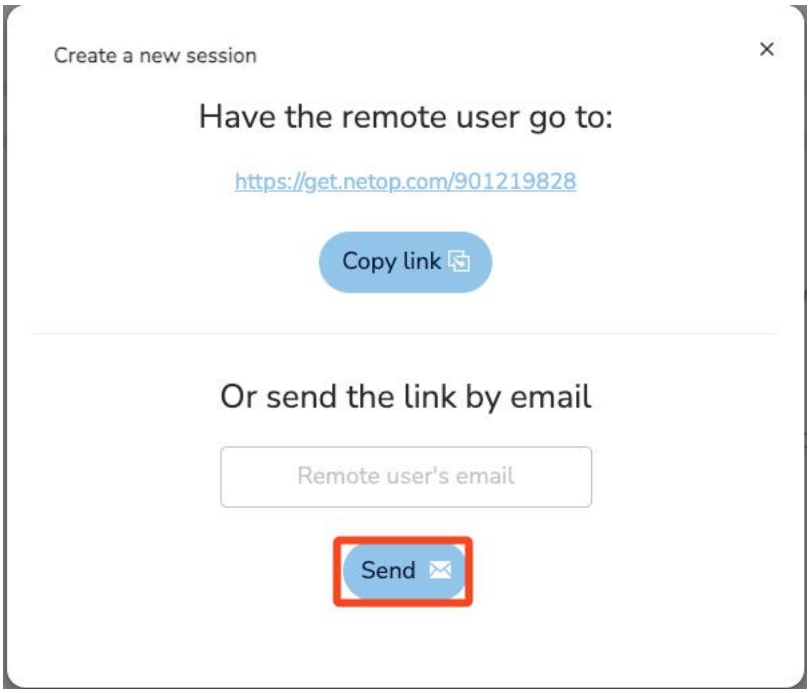


This automatically creates a one-time session key and provides you with several ways of sharing the session details with another user.

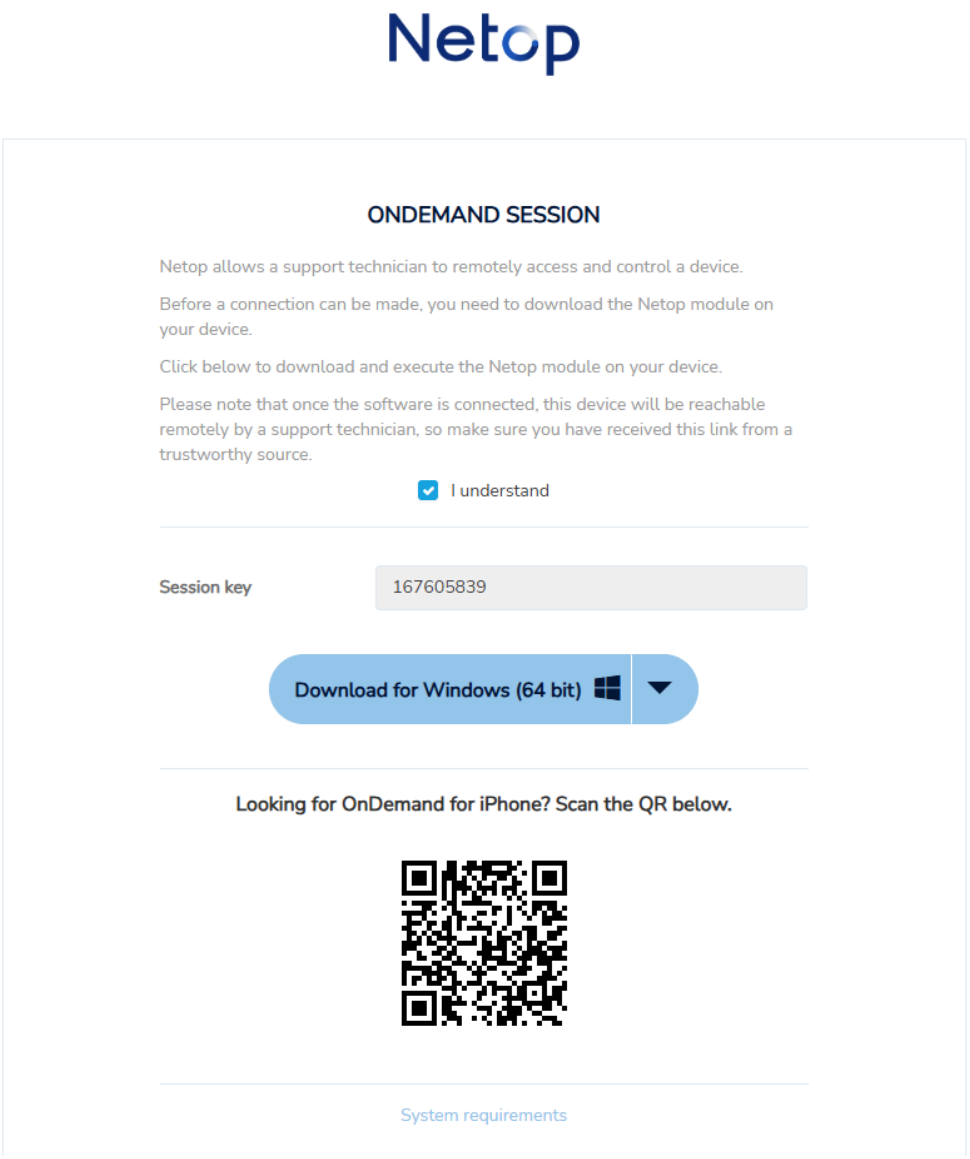
To copy the link to the clipboard, click on the **Copy link** button.



3. To send the link by email, specify the email of the user in the "*Remote user's email*" entry field and click on the **Send** button.



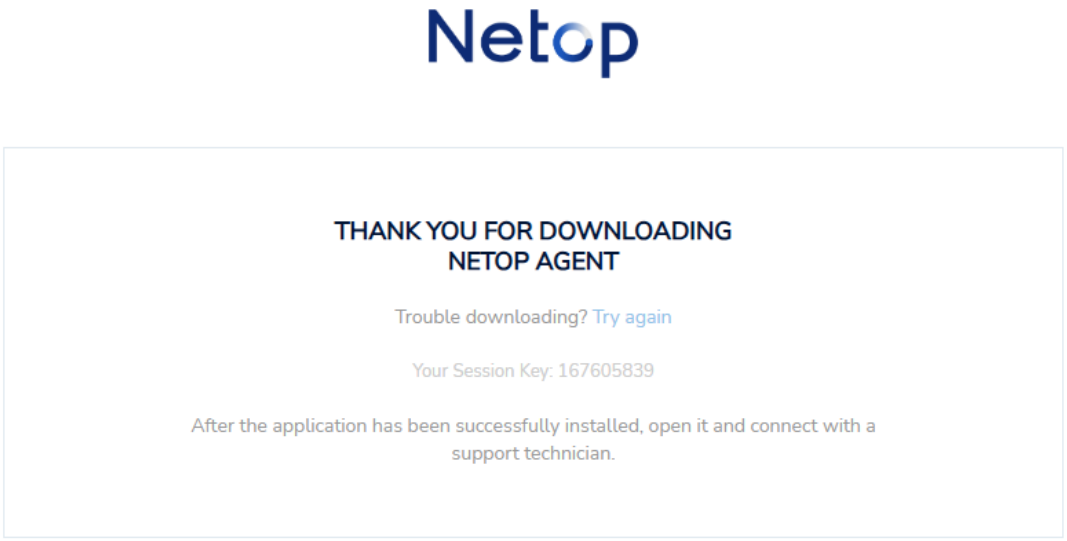
4. Once the remote user accesses the link received from the support technician, a custom download page is shown.



NOTE: The **Portal** detects the platform that you use to access the **OnDemand** session link and displays the corresponding download link.

The remote user first needs to acknowledge that the link was provided by a trustworthy source before being allowed to download the **OnDemand** application.

When you create an **OnDemand Session**, you receive a browser notification on the **Guest** device. Click on the notification to go to the **OnDemand** session queue.



To allow website notifications in the browser, proceed as follows:

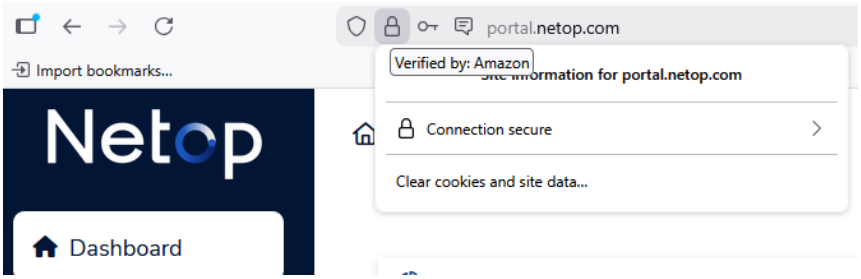
- **For Chrome***

1. Open the **Chrome** internet browser.
2. In the address search bar, specify **`portal.netop.com`**.
3. Click on the "**View Site Information**" button (the lock icon in the search bar).
4. Select "**Allow**" from the "**Pop-ups and redirects**" drop-down menu.

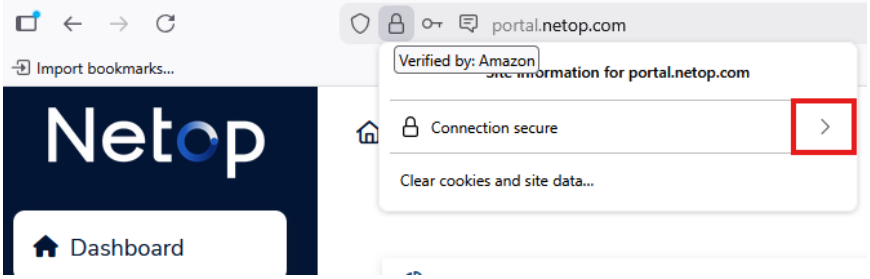
* Latest version

- **For Firefox***

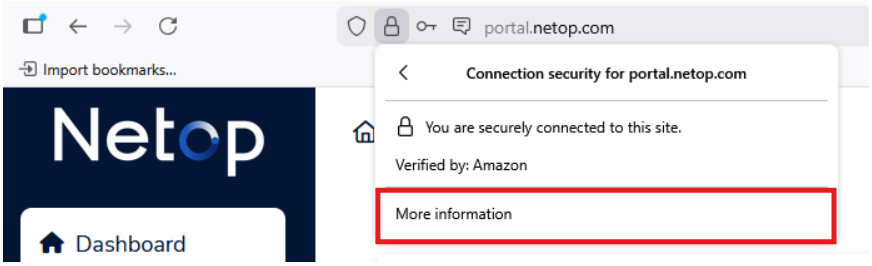
1. Open the **Firefox** internet browser.
2. In the address search bar, specify **`portal.netop.com`**.
3. To view the **Site information**, click on the **lock** icon in the address search bar.



4. Click on the **right arrow**.

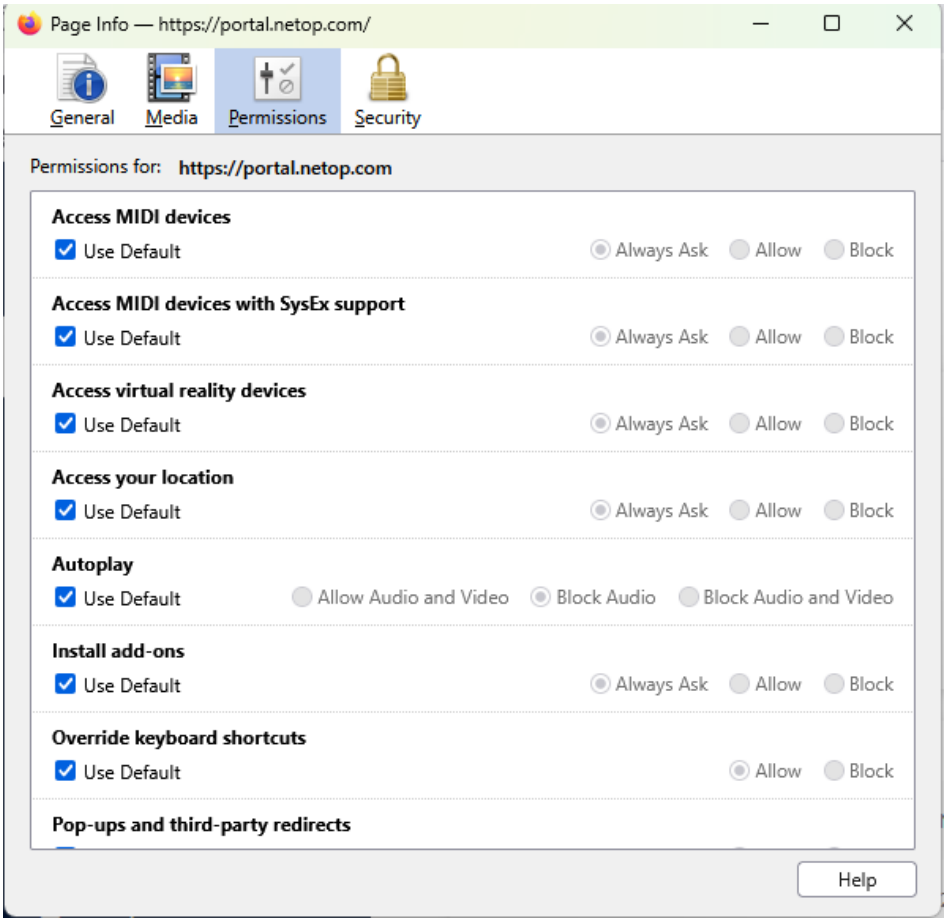


5. Click on the **More Information** button.



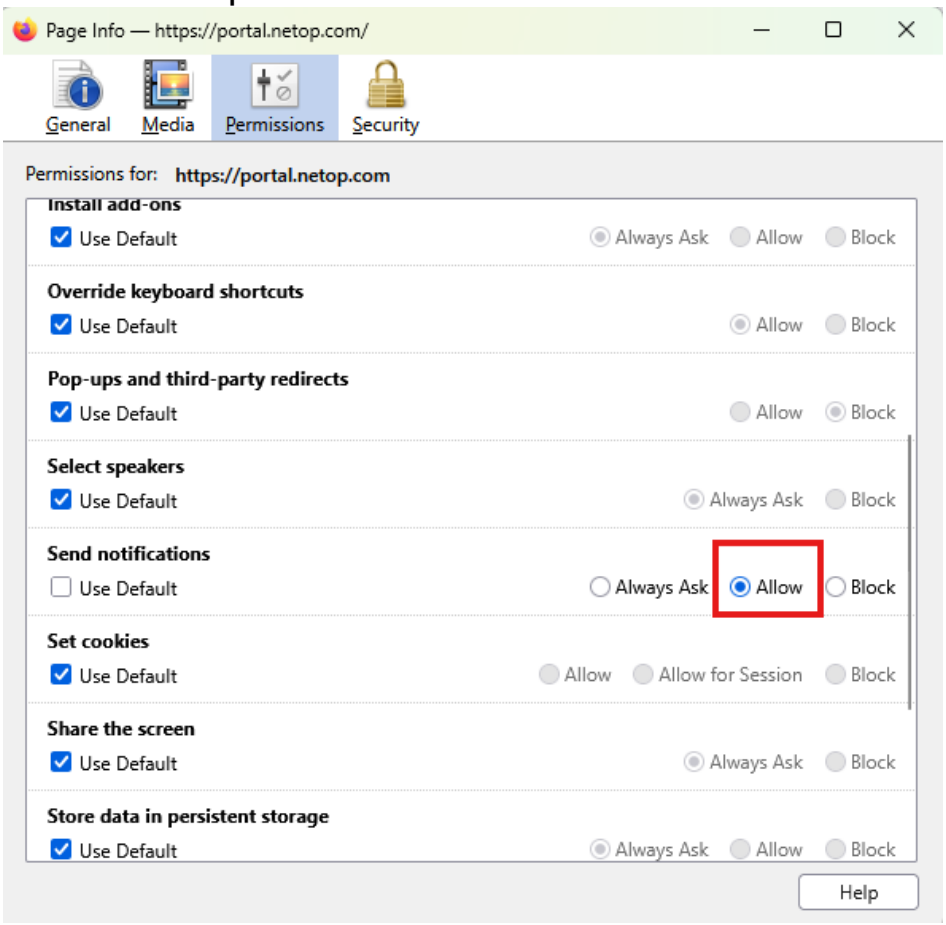
* Latest version

6. Click on the **Permissions** tab.



7. Uncheck the "**Use default**" check button for the "**Send Notifications**" permission.

8. Select the "**Allow**" option.

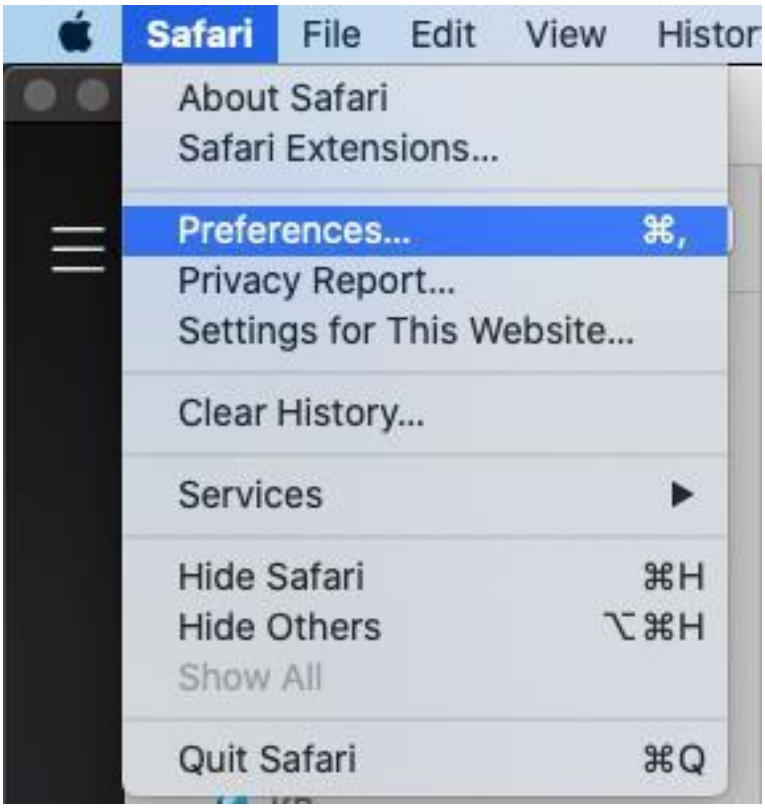


- **For Safari***

1. Open the **Safari** internet browser.
2. In the address search bar, specify **`portal.netop.com`**.

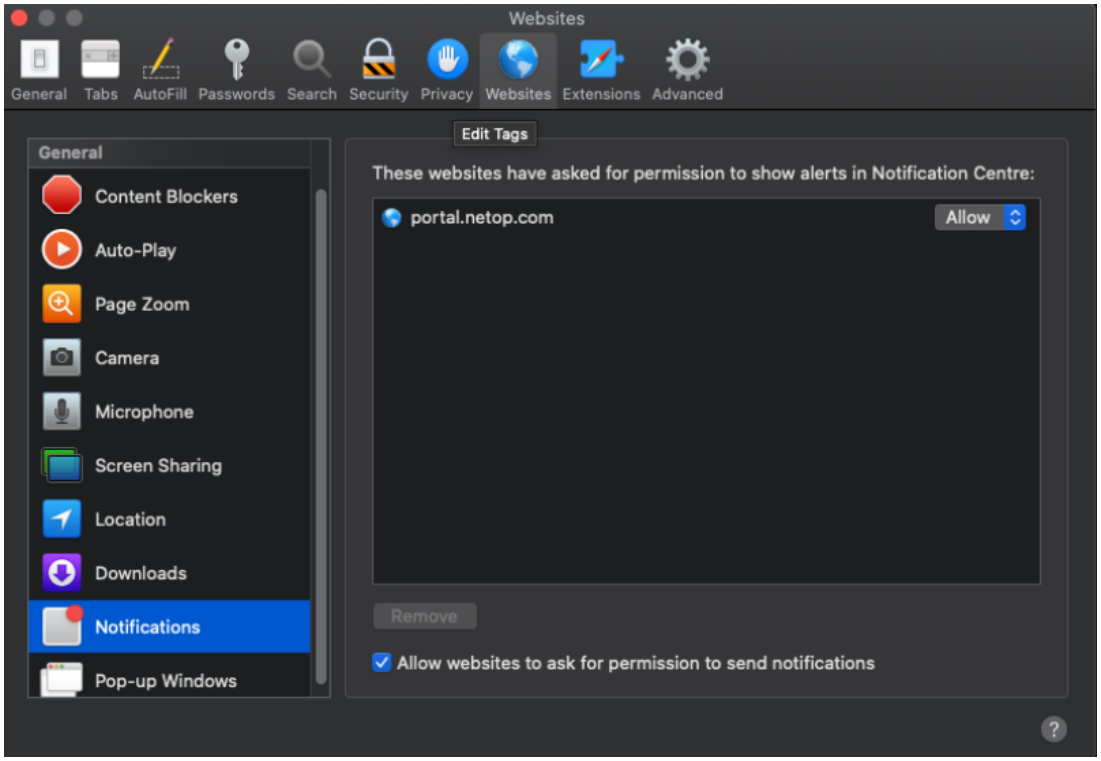
* Latest version

3. In the **Safari** menu, go to **Preferences**.



4. In the **Preferences** window, click on the **Websites** icon and then on **Notifications**.

5. Click on the dropdown button corresponding to the `portal.netop.com` and select **Allow**.



NOTE: To receive **OnDemand** browser notifications, make sure that notifications are allowed in the browser.

3.2.2 Start an OnDemand Session application on a Windows machine

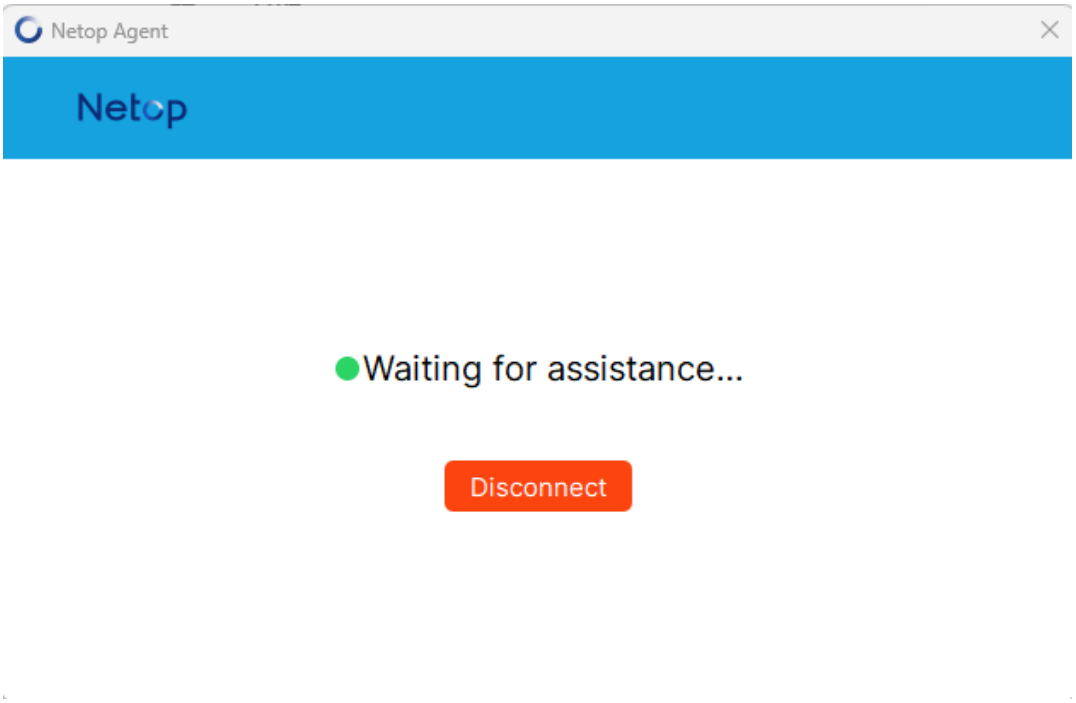
1. Once the **OnDemand** application is executed, a **UAC** prompt might be displayed, asking the user to elevate the application.

If the elevation is granted, the support technician can fully control elevated applications (i.e., Task Manager) as well as **UAC** prompts, while required Firewall exceptions are automatically added to the system. If the elevation is not granted, the **OnDemand** application still runs and is not elevated.

The support technician can connect, and the elevated applications are not controllable with keyboard and mouse.

NOTE: While an elevated application is in the foreground and if the **OnDemand** application was not elevated, keyboard and mouse control are unavailable, until the user on the controlled machine switches to a non-elevated application.

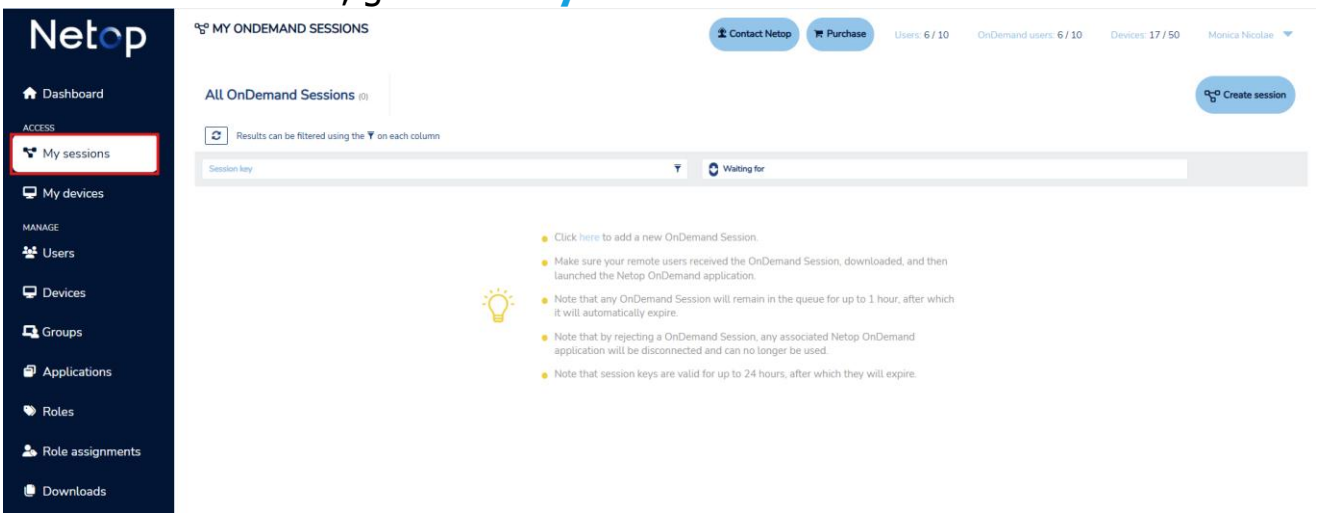
2. After the elevation is granted or denied, the **OnDemand** application starts and waits for a support technician to connect.



3.2.3 Initiate an OnDemand Session remote connection

To initiate an **OnDemand** session, proceed as follows:

1. Within the **Portal**, go to the **My sessions** tab.



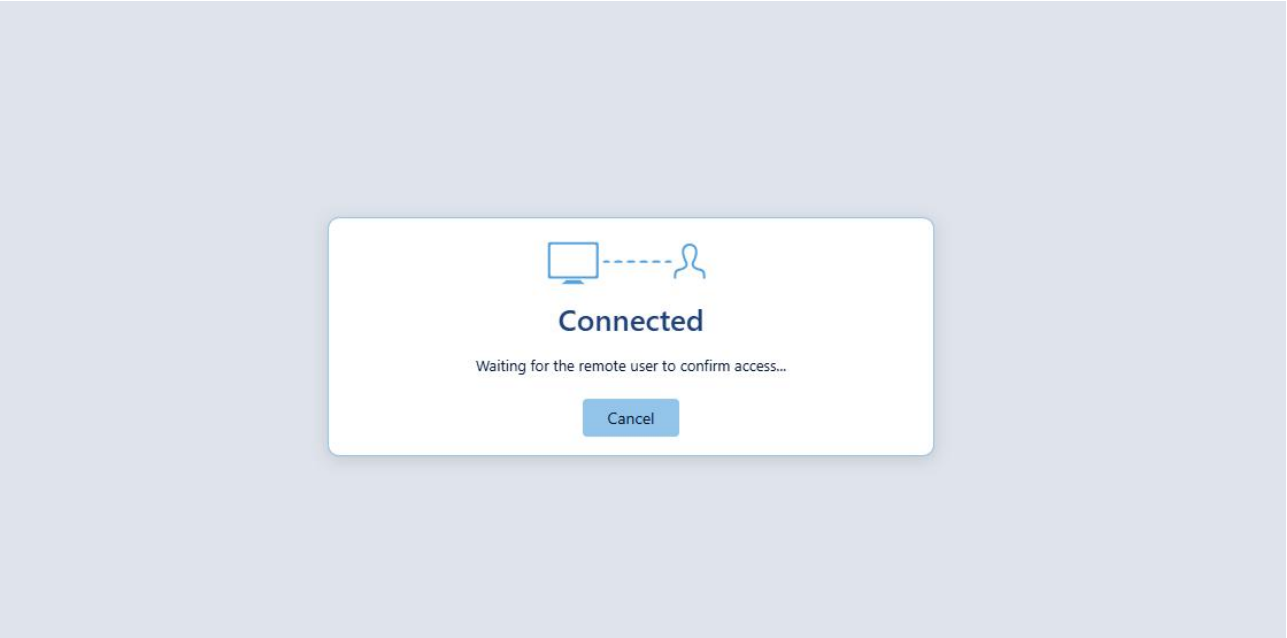
The displayed queue includes all the **OnDemand Sessions** started by remote users and the time since they are waiting for a connection. Only the running **OnDemand Sessions** can be seen in the queue.

NOTE: The **Session key** column includes icons for the permissions when connecting to that device, as granted by the role assignments for the current user.

Refer to the Roles and Role assignments sub-chapter for more information.

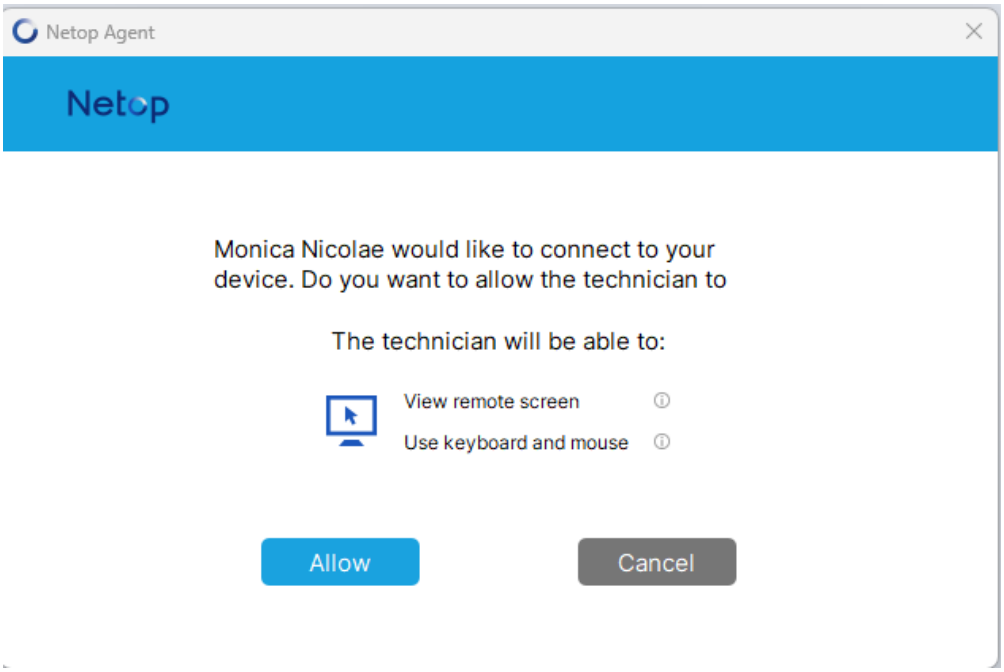
Only the running **OnDemand Session** can be seen in the queue. The **OnDemand Sessions** stay in the queue for **1h** before being automatically disconnected. An **OnDemand** session key is valid **24h** since it was created.

Click on the **Start session** button. The **Control through browser** page starts in a new tab.

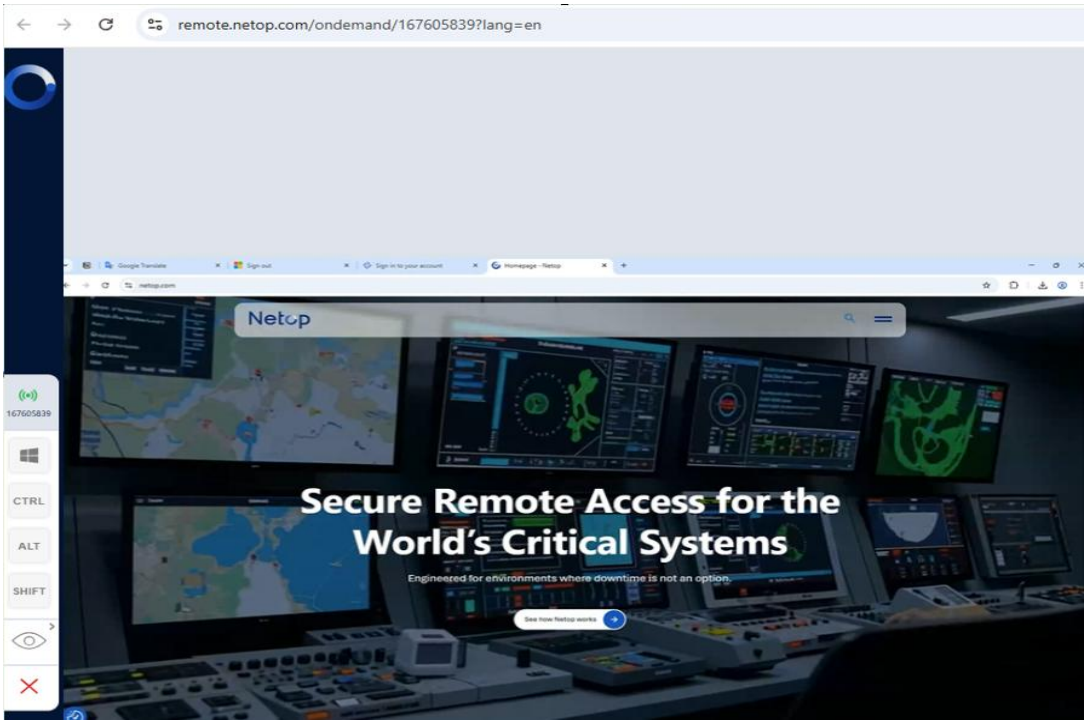


NOTE: As an alternative to starting the session, the support technician can reject any session in the queue. This automatically disconnects the **OnDemand** application and disables the **OnDemand** session. A new **OnDemand** session is necessary to be created and sent to the remote user for a new remote session to be initiated.

2. The remote user needs to allow the support technician access to the device before the remote session starts.

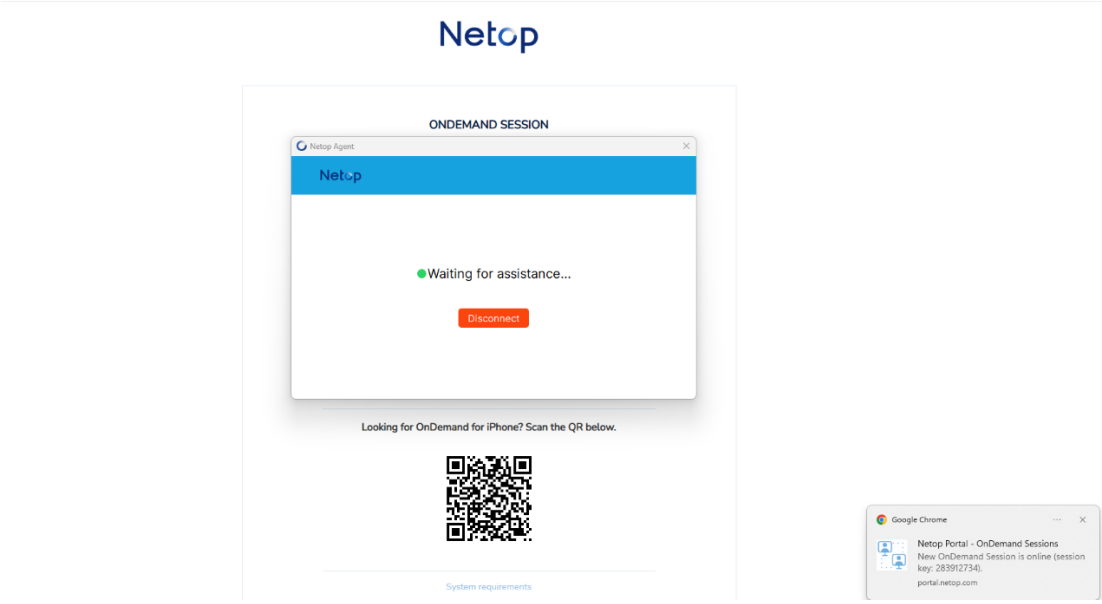


3. Once access is granted, the remote session starts.



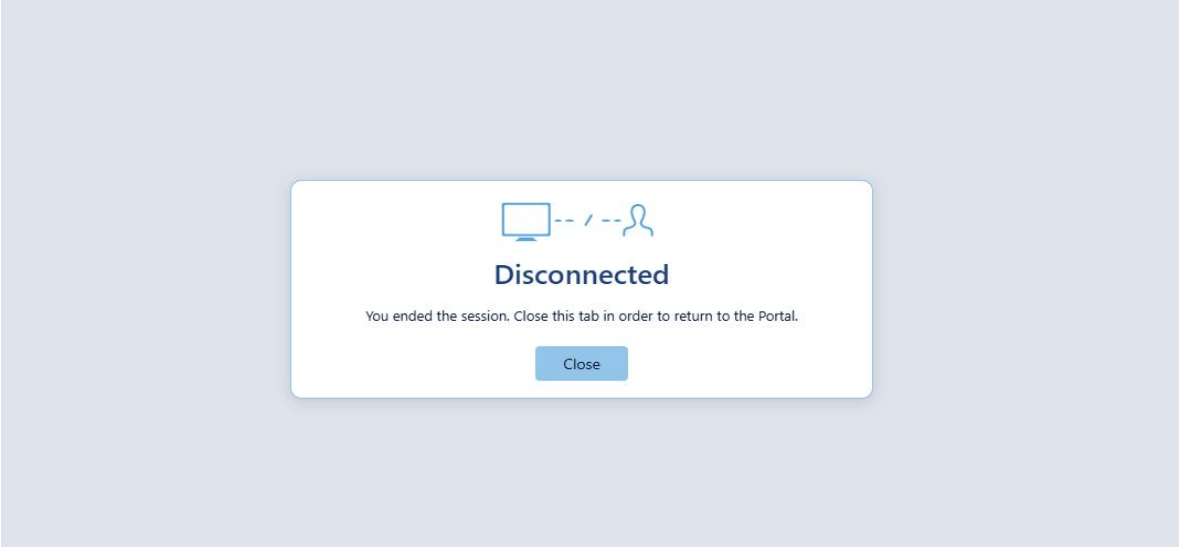
The **Browser Based Support Console** toolbar includes virtual key modifiers to use during the remote session. Each of the 4 key modifiers has 3 possible states: off, on, and always on (use it by double-clicking on the key modifier). These key modifiers help send various key combinations to the remote machine, whenever the physical keyboard cannot be used for this. The **View** menu allows the support technician to switch between **Fit To Screen** and **Actual Size** for the displayed image.

4. The remote user sees a notification that the session has started, along with information about the support technician's name and the granted permissions. The remote user can close the session at any moment, by clicking on the **Disconnect session** button, or by using the keyboard hotkey (**CTRL** + **SHIFT** + **X**).



NOTE: Using the disconnect hotkey closes the session immediately, without confirmation. This is done to make sure the remote user has an unobstructed method of closing an ongoing session.

5. Once the remote session is closed, the support technician is notified about it in the **Browser Based Support Console** page.



3.2.4 OnDemand Sessions Clipboard functionality

The **OnDemand Sessions** feature a simple text **Clipboard** functionality, which is achieved by synchronizing the clipboard between the **Agent** and the **Client** devices. The toolbar, right-click Copy/Paste, and the following key combinations are available for technicians to copy and paste the content:

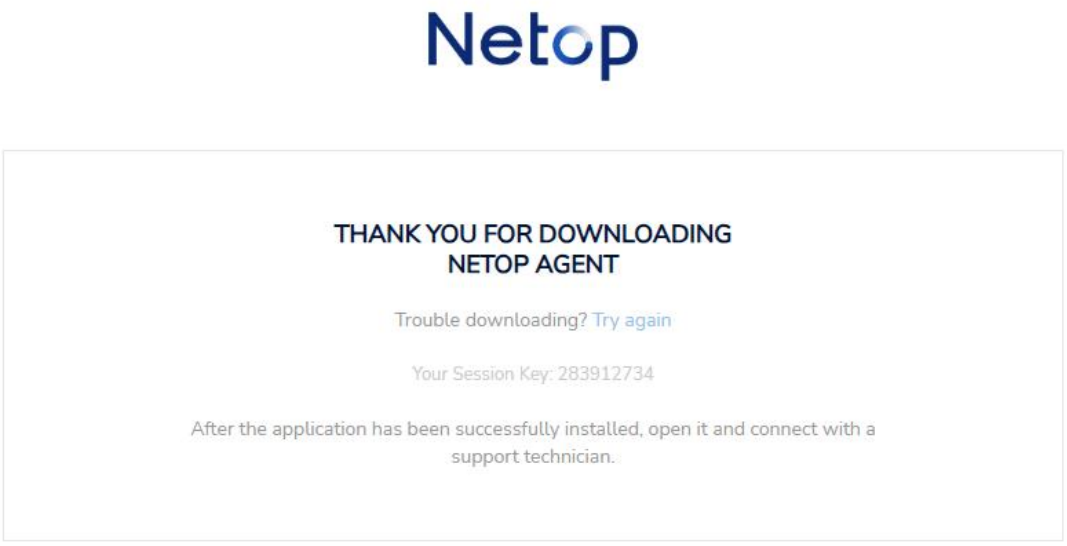
Client	Agent	Key combinations	Toolbar available
macOS	Windows	CTRL-V	no
		CTRL-V	yes
		CMD-V	no
		WIN-V	yes
		CMD-C	no
		WIN-C	yes
		CTRL-C	no
		CTRL-C	yes
		right click - Copy	no
		right click - Paste	no
Windows	macOS	CTRL-V	no
		CTRL-V	yes
		WIN-V	no
		CMD-V	yes
		WIN-C	no
		CMD-C	yes
		CTRL-C	no
		CTRL-C	yes
		right click - Copy	no
		right click - Paste	no

NOTE: The **Clipboard** functionality works between Windows and macOS **Agent** and **Client** devices.

The **Clipboard** functionality works on the following web browsers: Chrome, Firefox, and Safari.

NOTE: Due to the latest security and privacy implementations made by Apple, Safari does not allow to copy and paste content between the **Agent** and **Client** devices, without permission from the user.

To synchronize the clipboard between the **Client** and **Agent** devices, press on the following button:



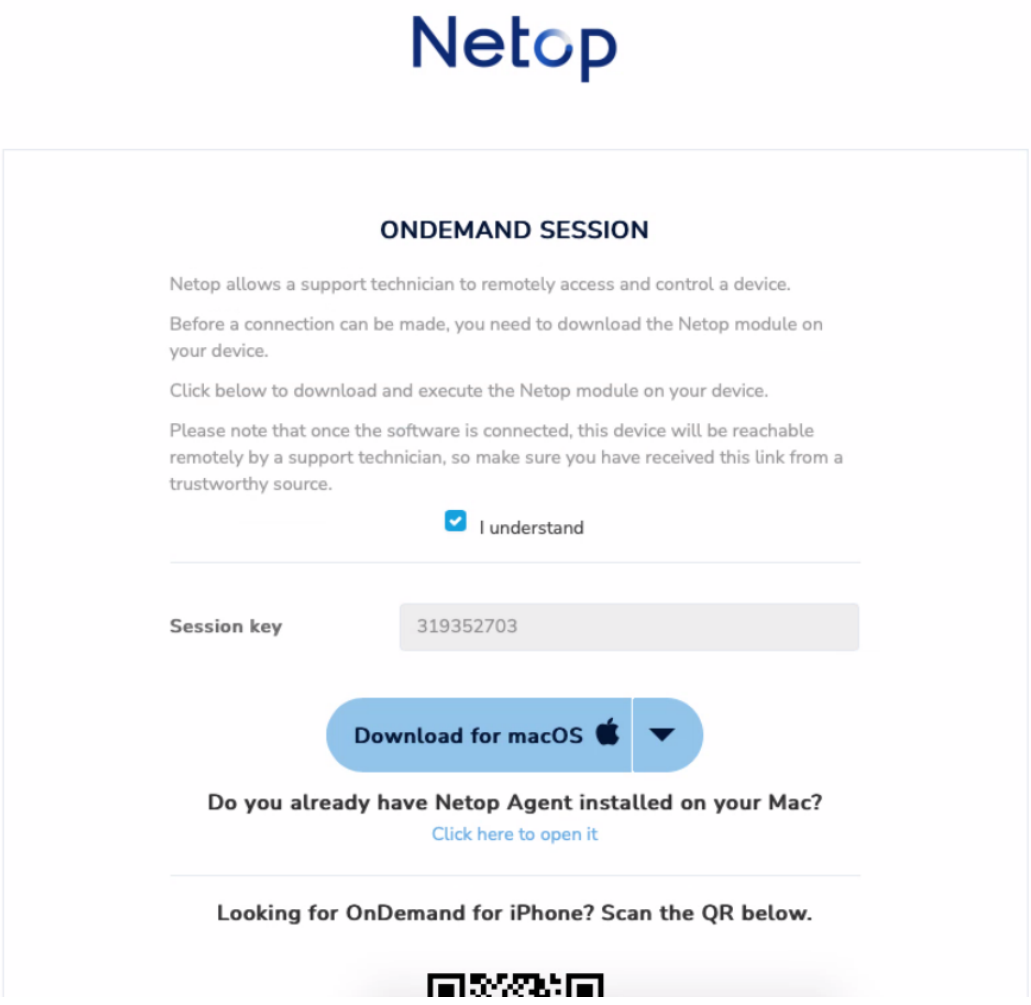
3.2.5 Start an OnDemand Session application on a macOS machine

Prerequisite:

- The **OnDemand** application installed on your macOS device

To install the **OnDemand** application on your macOS device, proceed as follows:

1. To install the **OnDemand** application, click on the link you received from your technical support provider. The **Session** window is displayed.



2. Click on the "**I Understand**" button to allow the download.
3. Download the `Netop Agent`.**pkg** file.
4. Execute the `Netop Agent.pkg` file on your macOS device. The **OnDemand Installer** window is displayed.

5. Click on the **Continue** button to continue with the installation process.
6. Click on the **Continue** button to accept the **L**icense **A**greement.
7. Click on the **Install** button to install the **OnDemand** application.

To use the **Netop Agent** on a macOS device, it is necessary that the following permissions are manually granted by the user.

These permissions require to be set only once.

- **Screen Recording** (applies for macOS 10.15 and above)
- **Accessibility** (applies for macOS 10.14 and above)

Without these permissions, the **Netop Agent Desktop** functionality can be restricted to:

- Viewing the desktop background, but no other applications
- Not being able to control the keyboard and mouse remotely

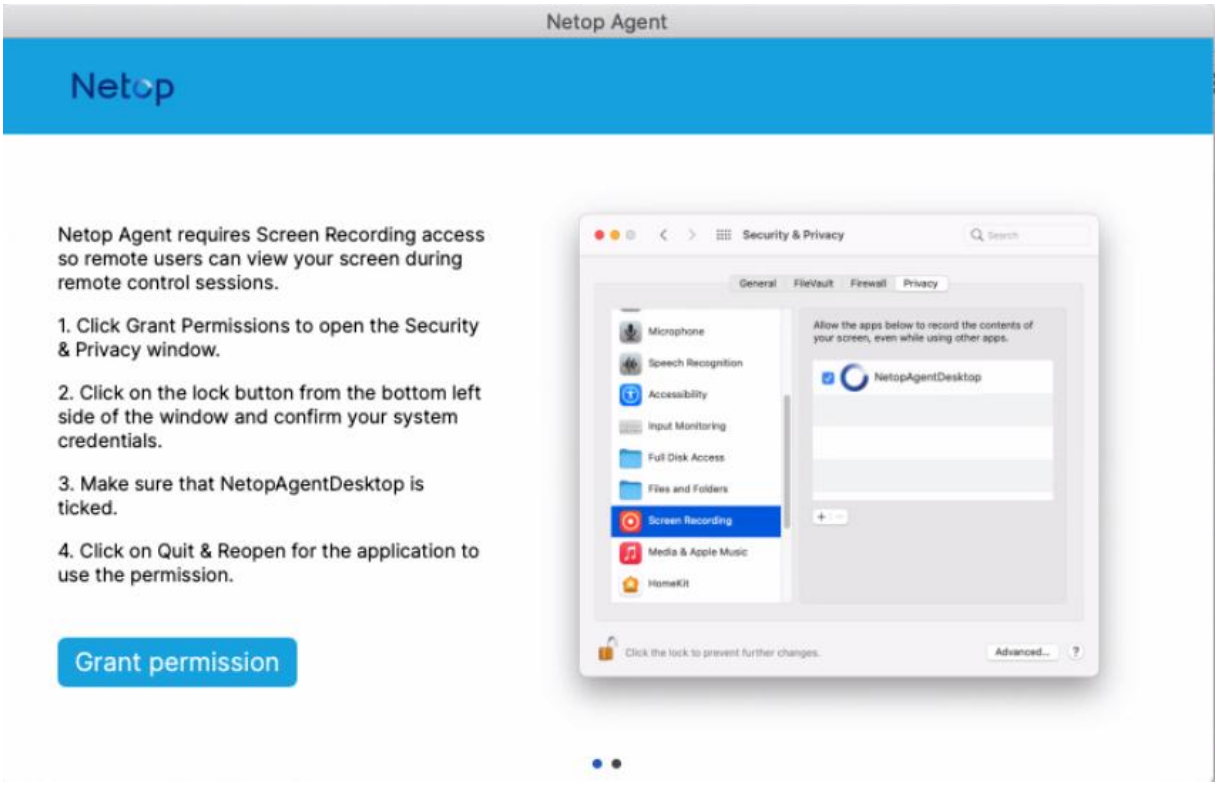
3.2.5.1 Screen Recording

Netop Agent Desktop requires **Screen Recording** access so remote users can view your screen during remote control sessions.

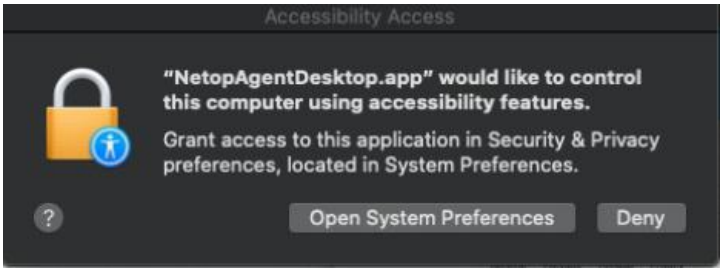
The first time you open the application on your device, you are prompted by the application to allow the **Screen Recording** permission.

To grant the permission, proceed as follows:

1. Click on the **Grant permission** button.

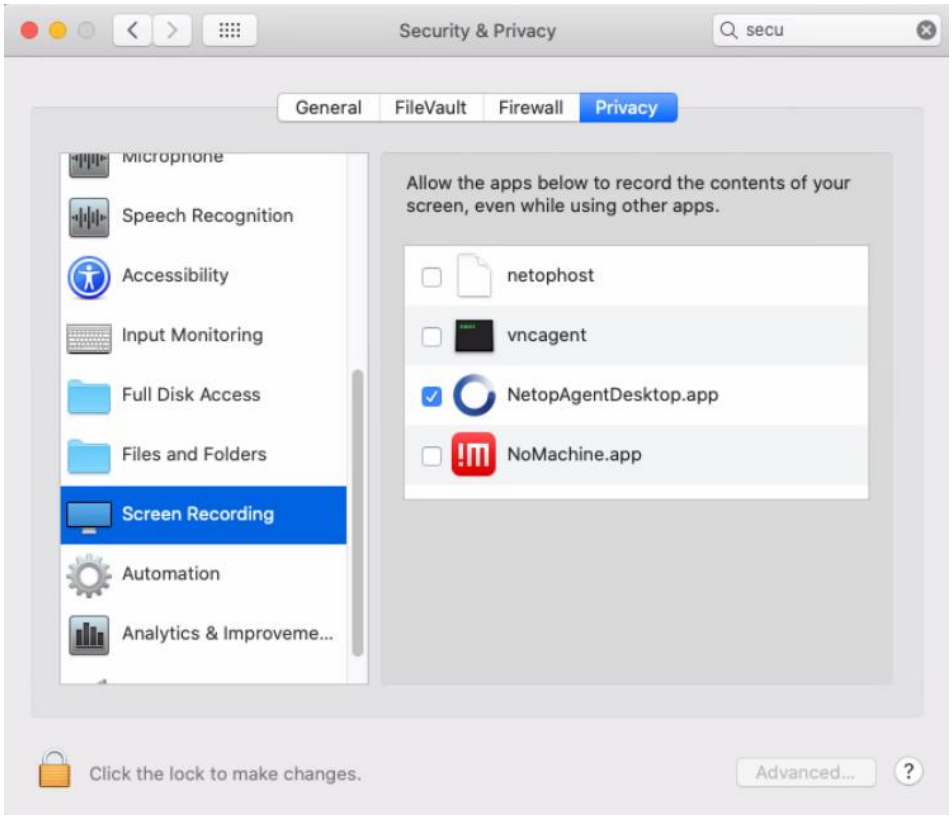


2. Open **System Preferences** when the **Screen Recording** dialog appears on the screen.

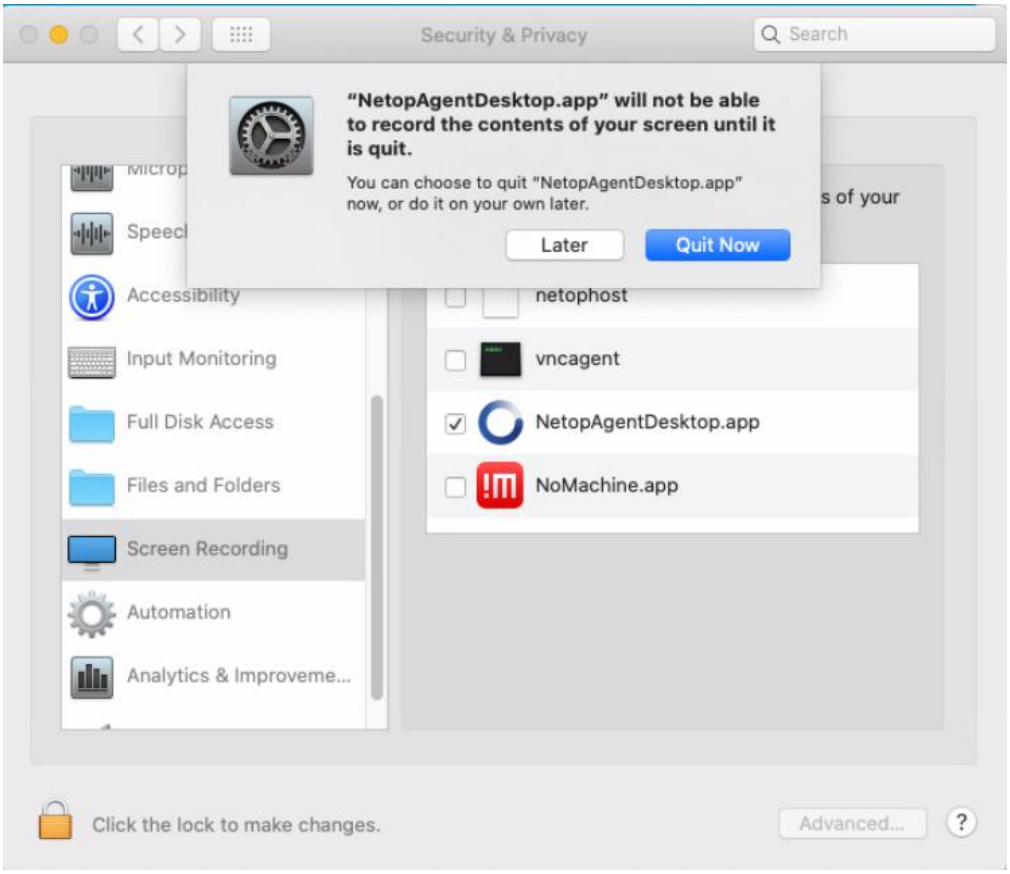


3. Click on the lock to make changes.

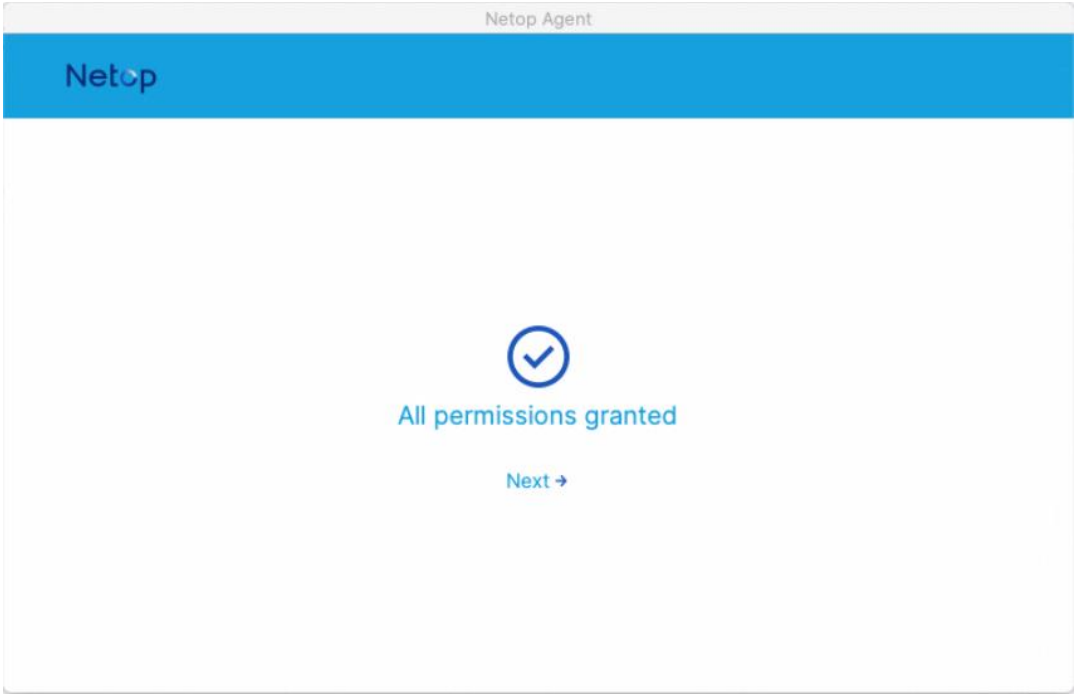
4. Select the **NetopAgentDesktop** checkbox to grant the **Screen Recording** permission.



5. **NetopAgentDesktop** requires to quit and reopen to use the permission. Click on the **Quit & Reopen** button to restart the application.



6. Click on **Next**.



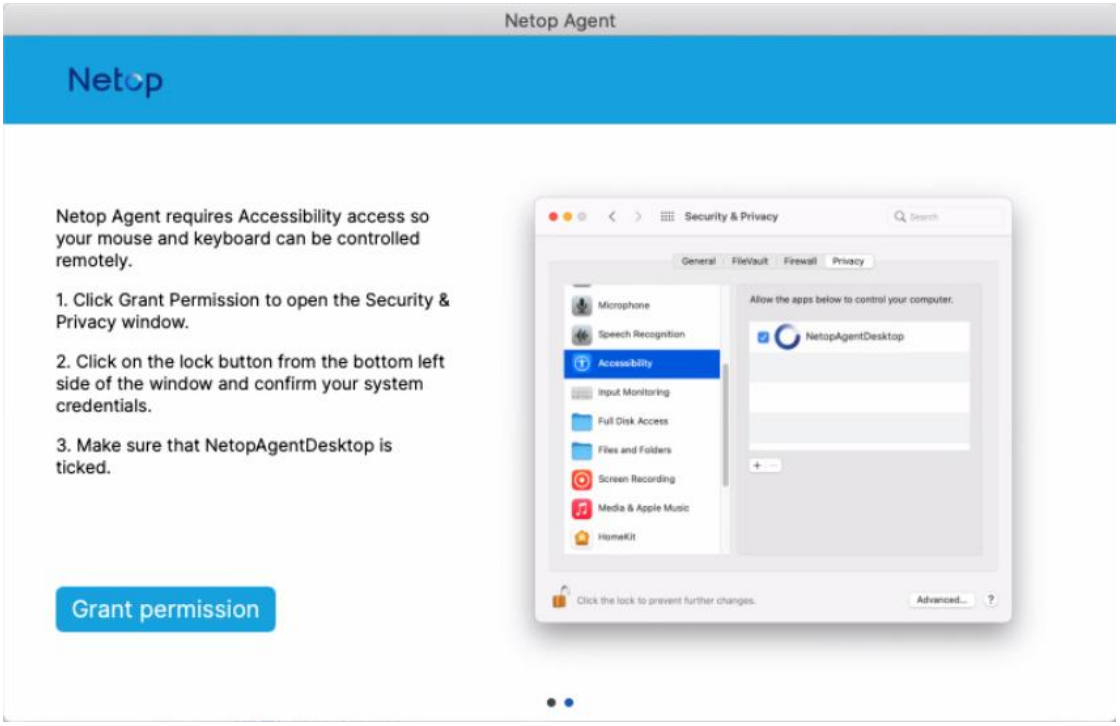
3.2.5.2 Accessibility

Netop Agent Desktop requires **Accessibility** access so your mouse and keyboard can be controlled remotely.

Once you granted the **Screen Recording** permission, the application prompts you to allow the **Accessibility** permission.

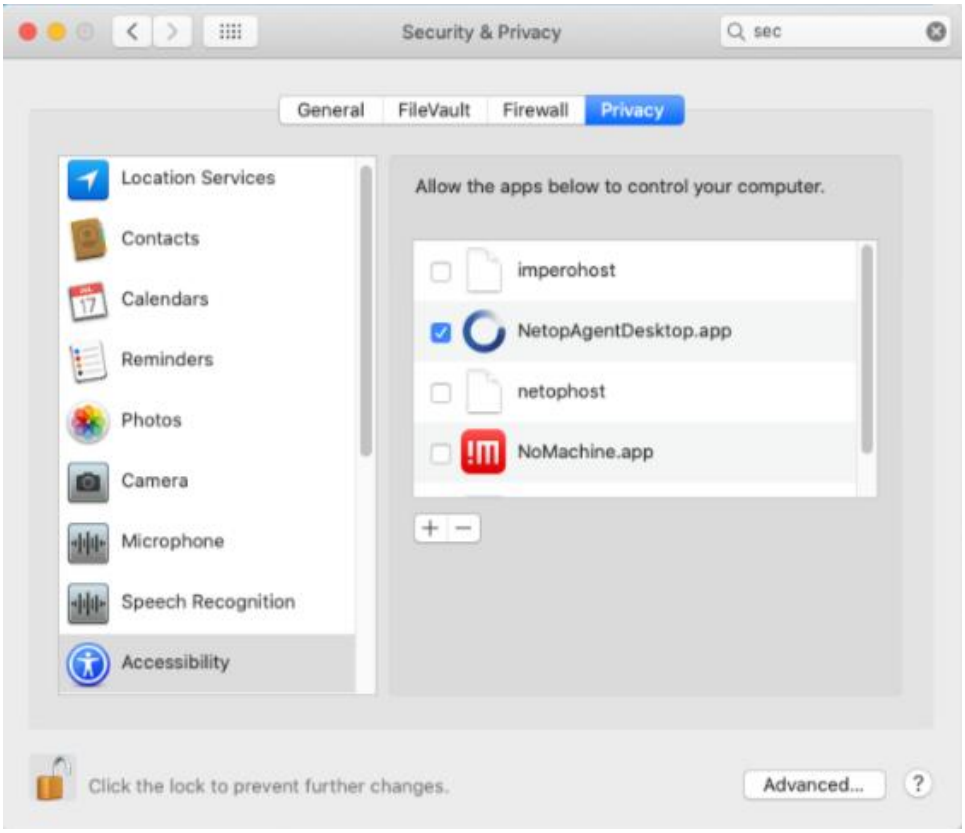
To grant the permission, proceed as follows:

1. Click on the **Grant permission** button.

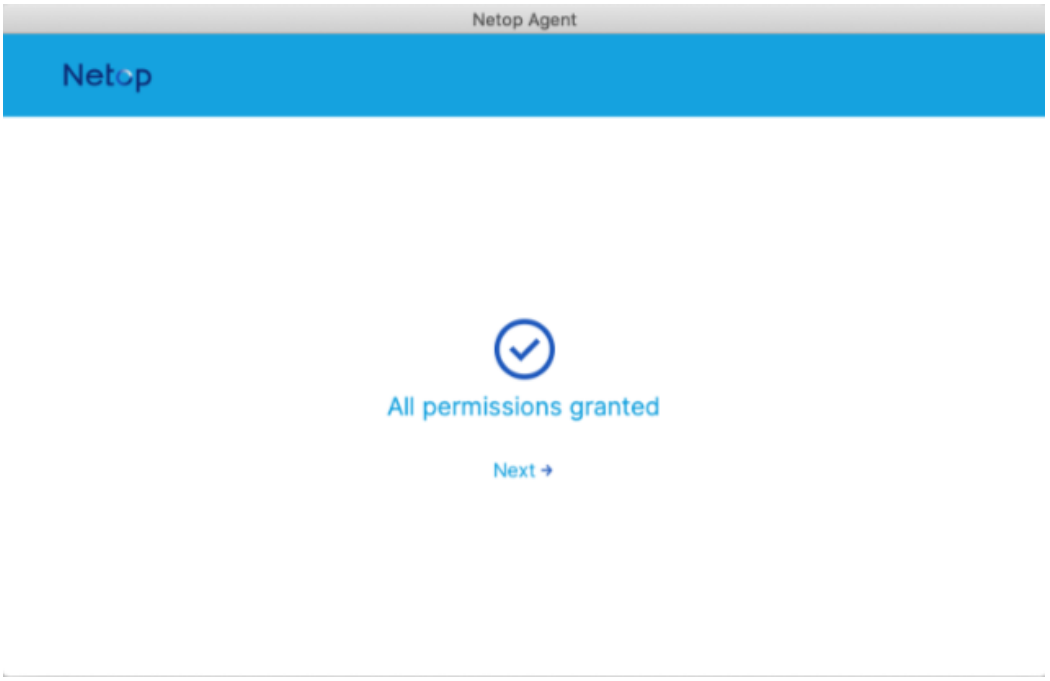


2. Open **System Preferences** when the **Accessibility** dialog appears on the screen.

3. Click on the lock to make changes.
4. Select the **NetopAgentDesktop** checkbox to grant the **Accessibility** permission.



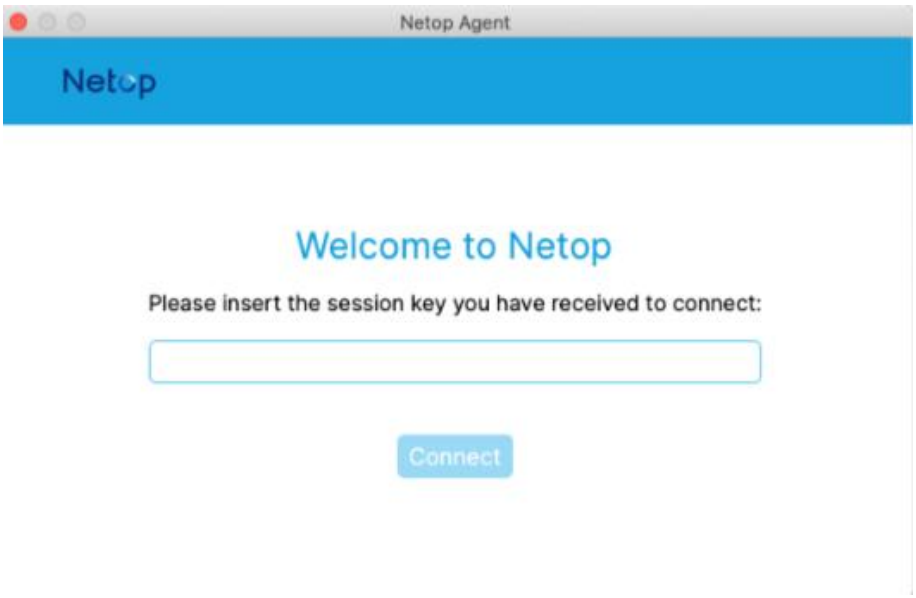
5. Click on **Next**.



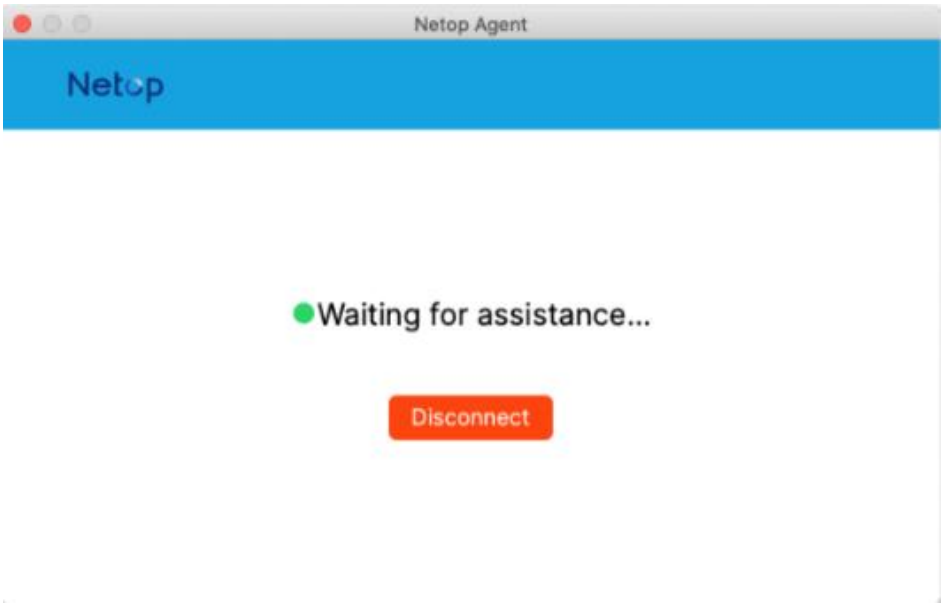
To start the **OnDemand** session, proceed as follows:

1. Open the **OnDemand** application.

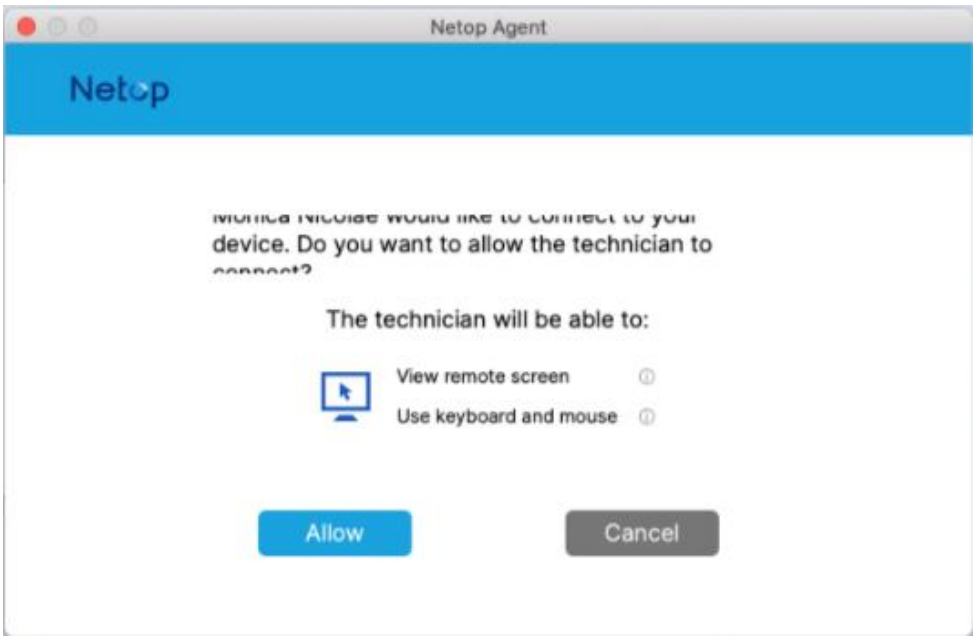
2. Specify the **session key** you received from your technical support provider.



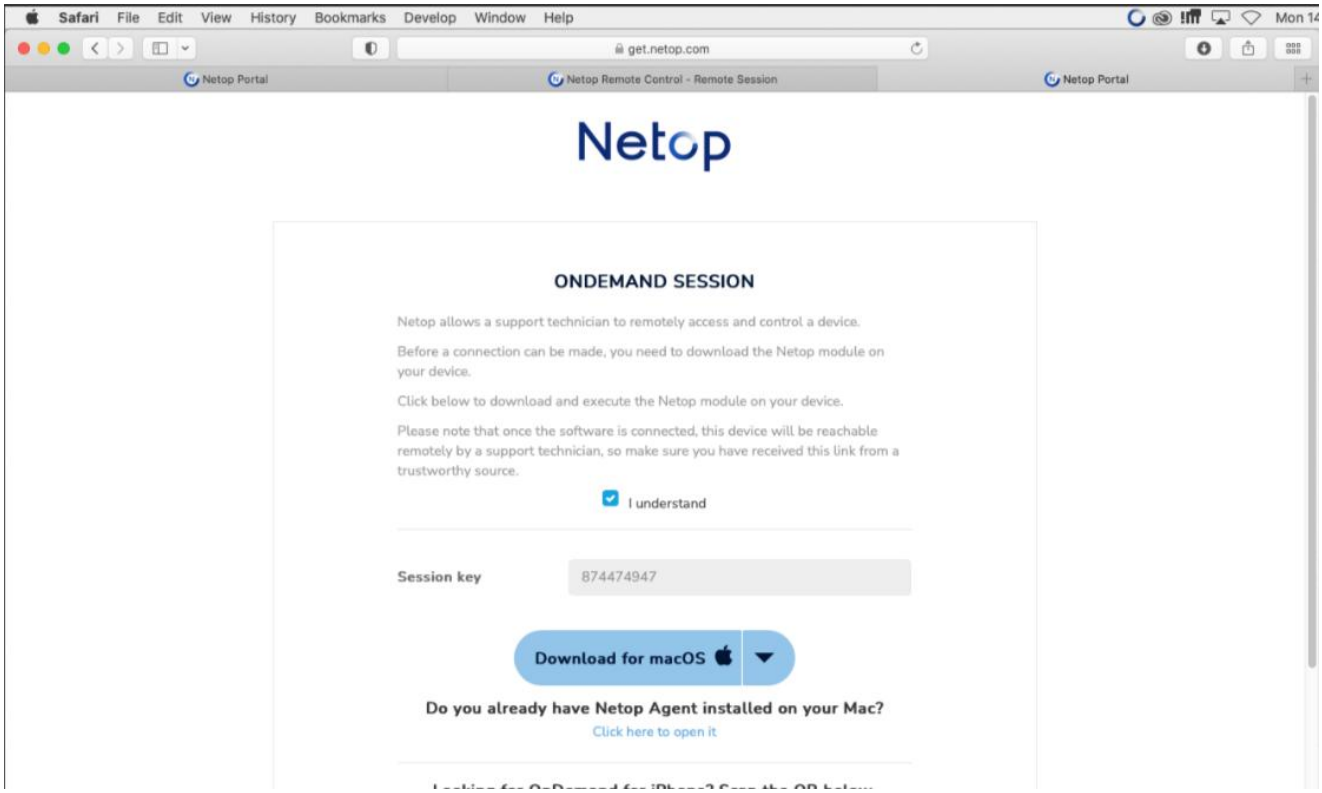
Wait for the technician to start the **OnDemand** session from the **Portal**.



3. Once the technician starts the **OnDemand** session from the **Portal**, you are prompted to allow the technician permissions for **View remote screen** and **Use keyboard & mouse**.



4. Click on the **Allow** button to start the **OnDemand** session.



3.2.6 Start an OnDemand Session application on an iOS device

With **OnDemand** for iOS you can view iOS devices screens and allow technicians to offer remote support.

Prerequisite:

- The **OnDemand** application installed on your iOS device

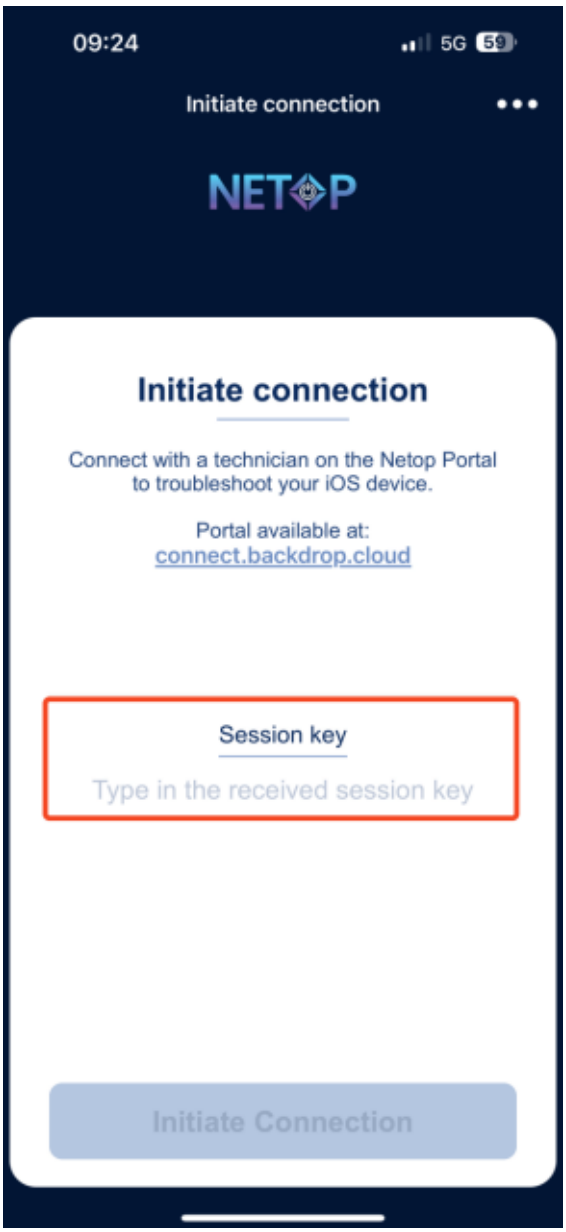
There are three ways to download the **OnDemand** application on your iOS device:

- From the AppStore
- From the link that you received from your technician
- By scanning the **QR** code from the download page

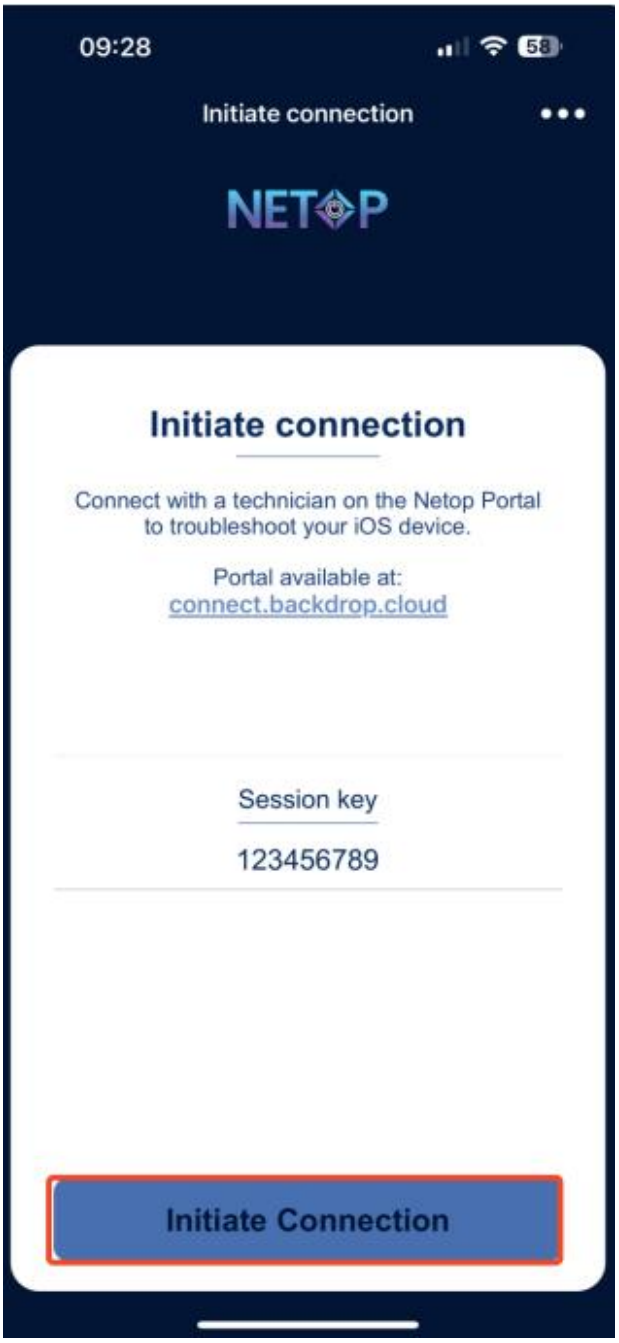
NOTE: If the **OnDemand** application is installed on your iOS device when you scan the **QR** code from the download page, the **OnDemand** app opens on your iOS device with the session key prefilled and ready for connection.

To start an **OnDemand** session, proceed as follows:

1. Open the **OnDemand** application on your iOS device.
2. Specify the **session key** that you received from your technician.

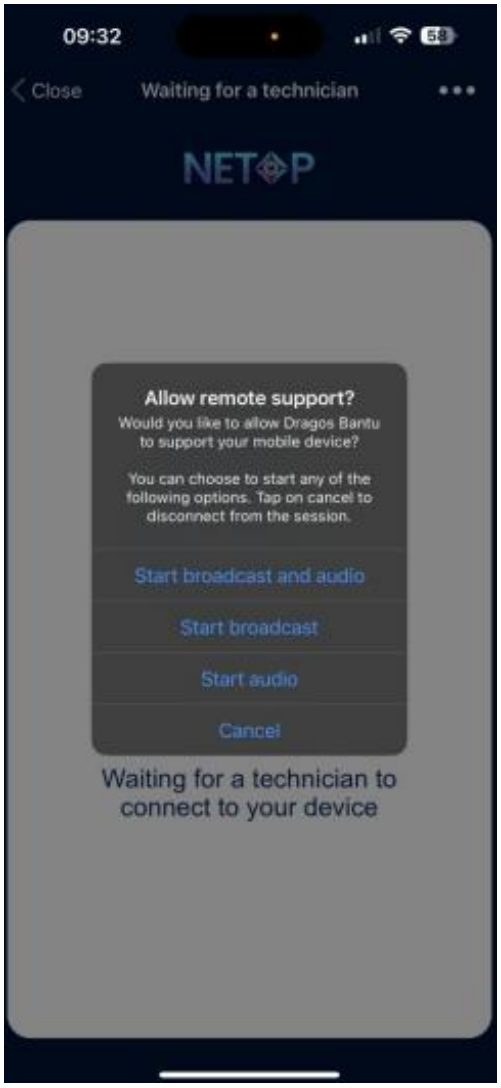


3. Click on the **Initiate Connection** button to initiate the **OnDemand** session.

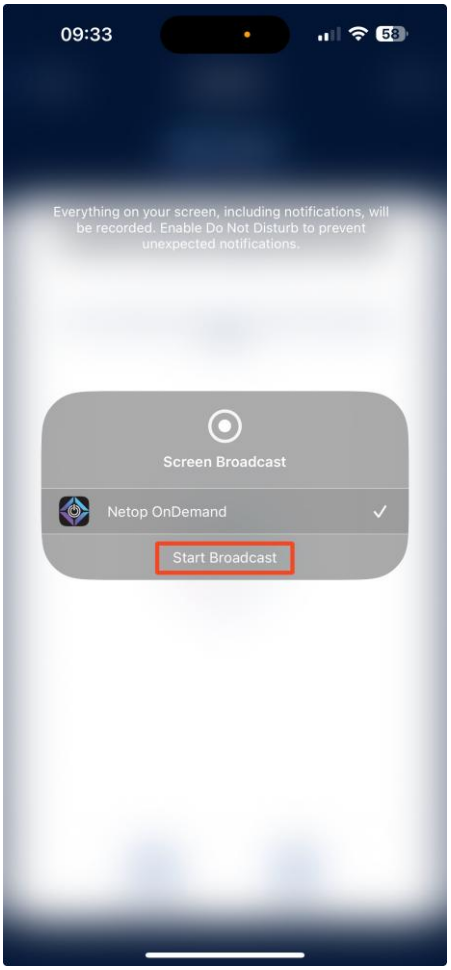


You connected successfully to the **OnDemand** session. Wait for the technician to start the **OnDemand** session from the **Portal**.

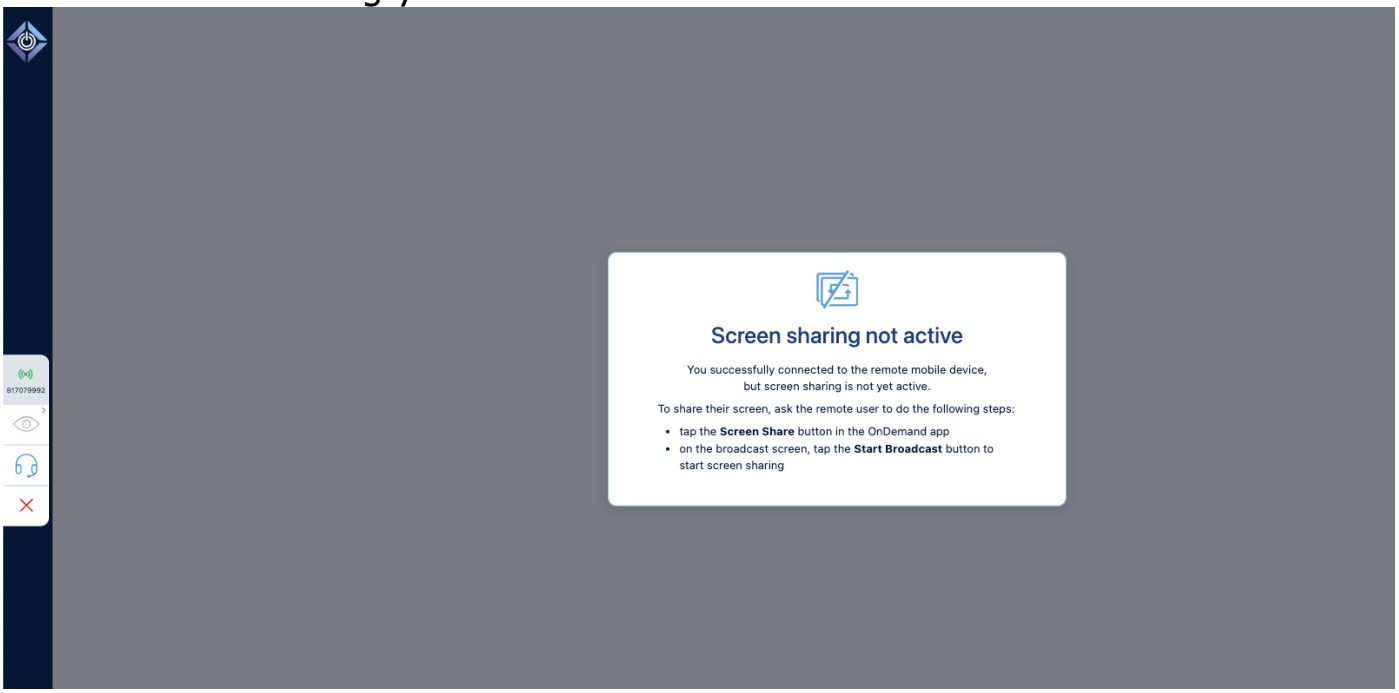
4. Select one of the following remote control options to allow the technician to connect to your iOS device:
   - **Start broadcast and Audio** – starts the **OnDemand session** with screen sharing and audio enabled
   - **Start broadcast** – starts with the **OnDemand session** only with the screen sharing enabled
   - **Start audio** – starts the **OnDemand session** only with the audio feature enabled
   - **Cancel** – cancels the **OnDemand** remote control session



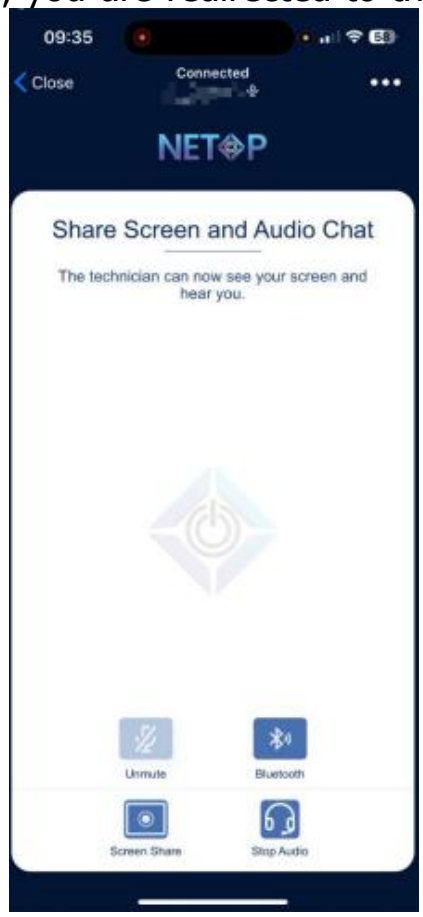
5. Click on the **Start Broadcast** button to start broadcasting your screen. The broadcast screen is displayed.



The following window is displayed on the technicians' monitor until you start broadcasting your screen.



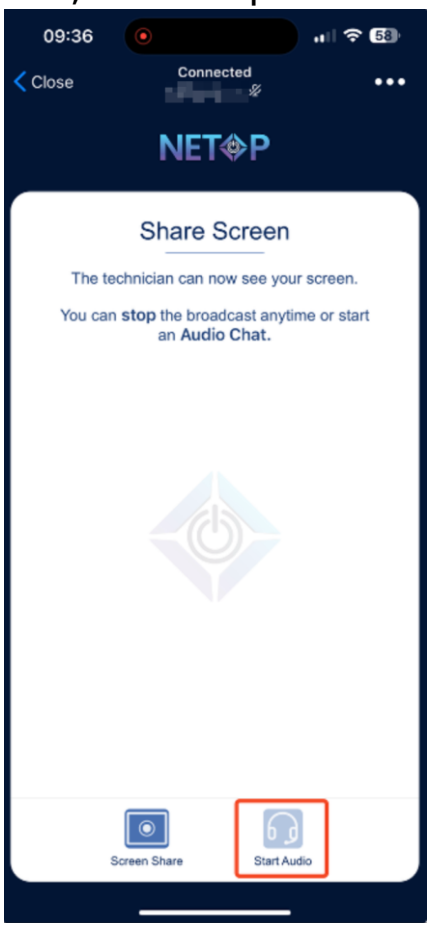
If you close this window, you are redirected to the following page:



6. You successfully started the **OnDemand** session.

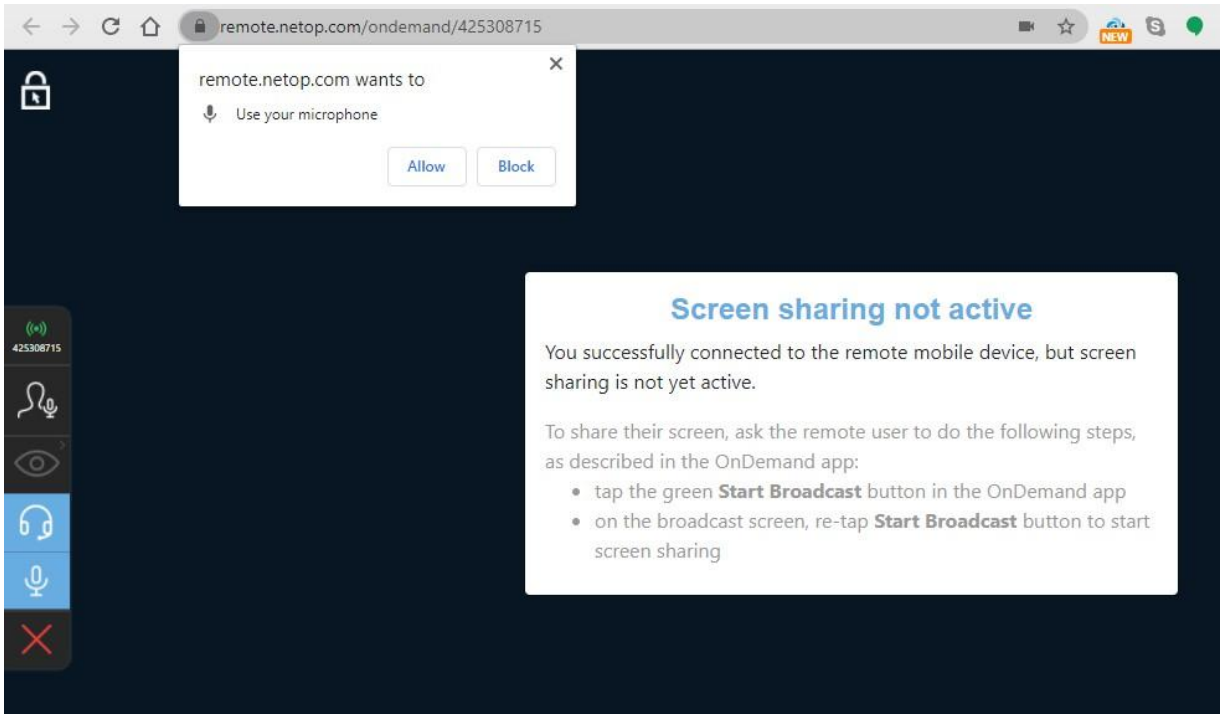
NOTE: **OnDemand** for iOS offers a view-only mode of the iOS device screen.

To make an audio chat request, click or tap on the **Start Audio** button.

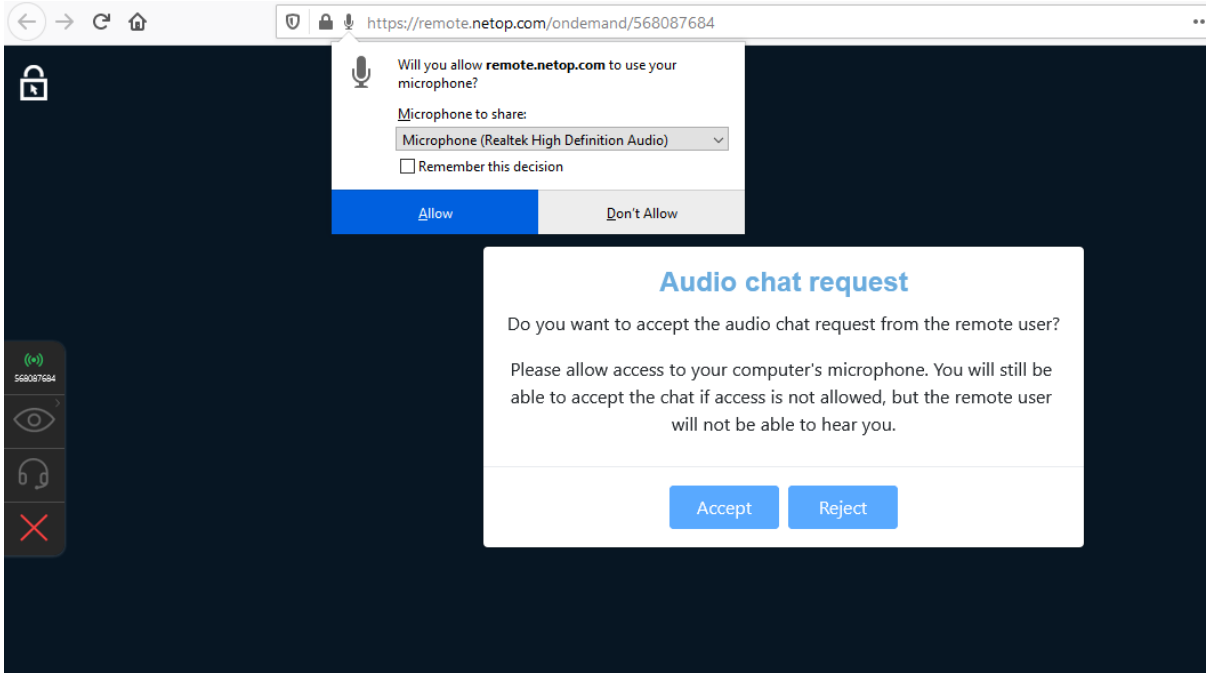


On the first use of the **Audio Chat** feature, you need to allow in the browser for the microphone to be used. A popup is displayed in the browser that requests the Technician to Allow or Deny the use of the microphone. To allow the microphone use, click on the **Allow** button in the popup.

- **For Chrome**



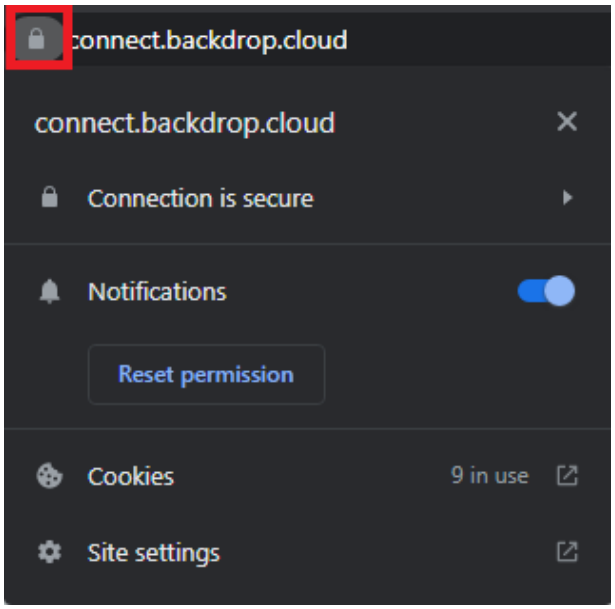
- **For Firefox**



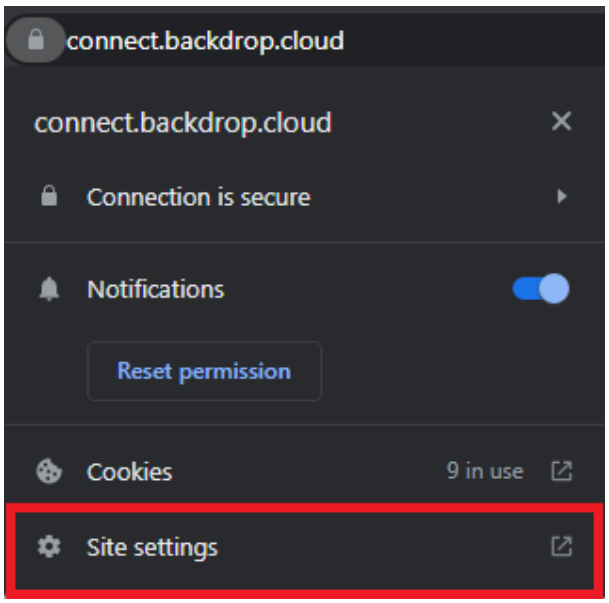
To allow the microphone to be used in the browser, proceed as follows:

- **For Chrome**

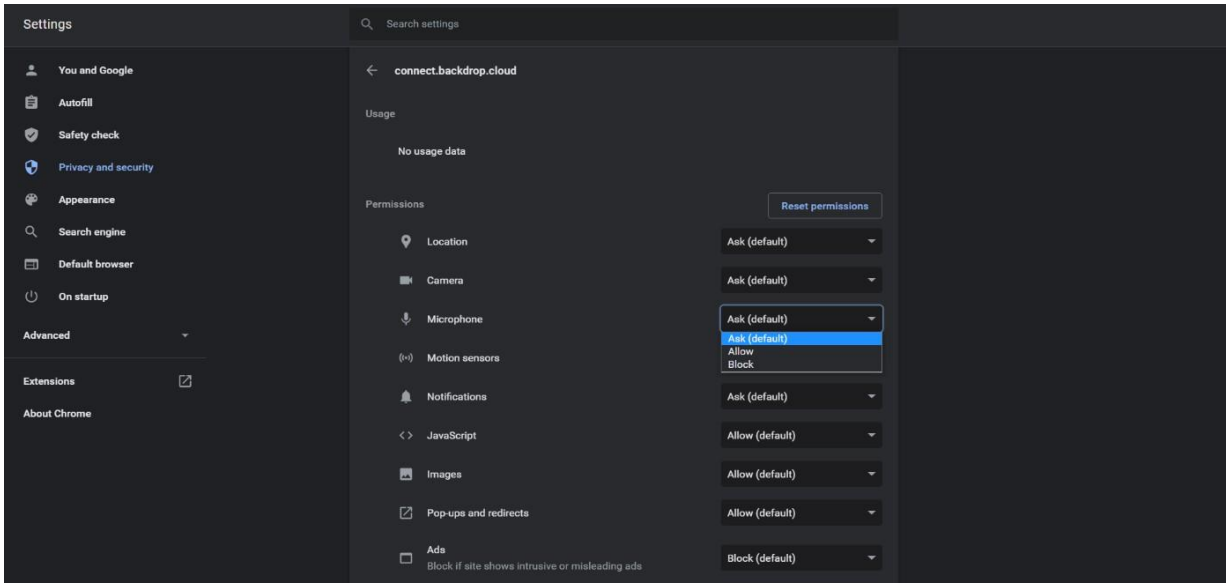
1. Open the **Chrome** internet browser.
2. In the search address bar, type in **`portal.netop.com`**.
3. Click on the "**View Site Information**" button (the lock icon in the search bar).



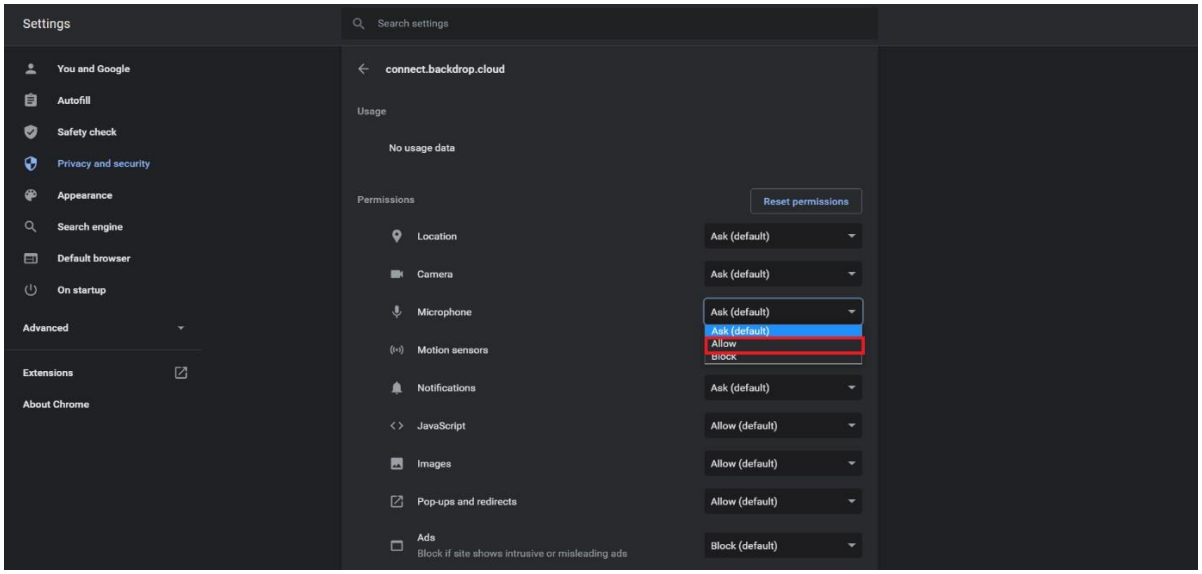
4. Click on **Site settings**.



5. Click on the dropdown button corresponding to **Microphone**.

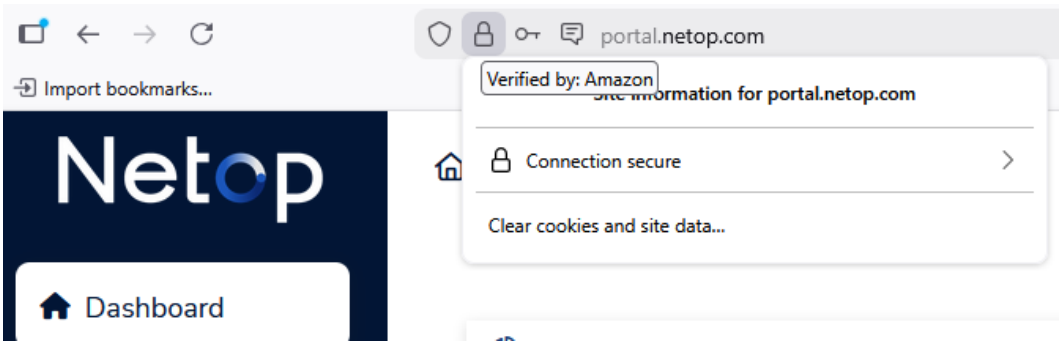


6. To enable the Microphone use, select the **Allow** option.

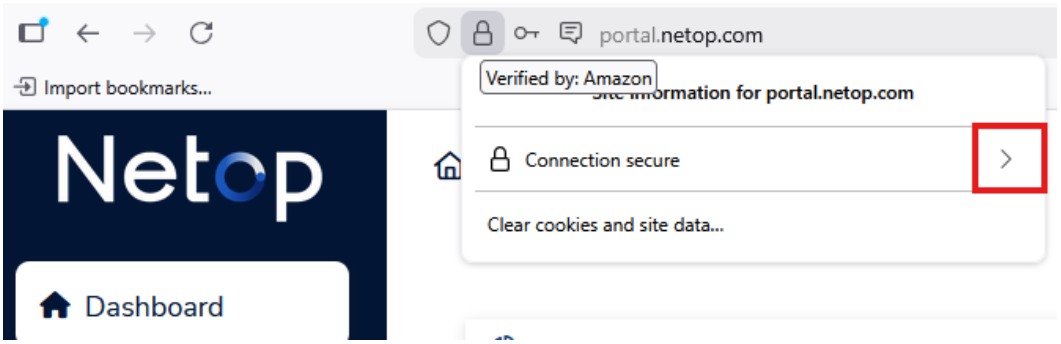


- **For Firefox**

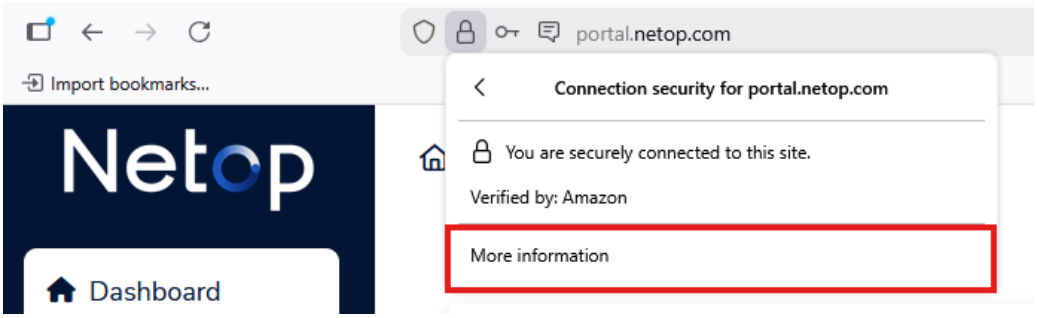
1. Open the **Firefox** internet browser.
2. In the search address bar, type in **`portal.netop.com`**.
3. Click on the **lock** icon.



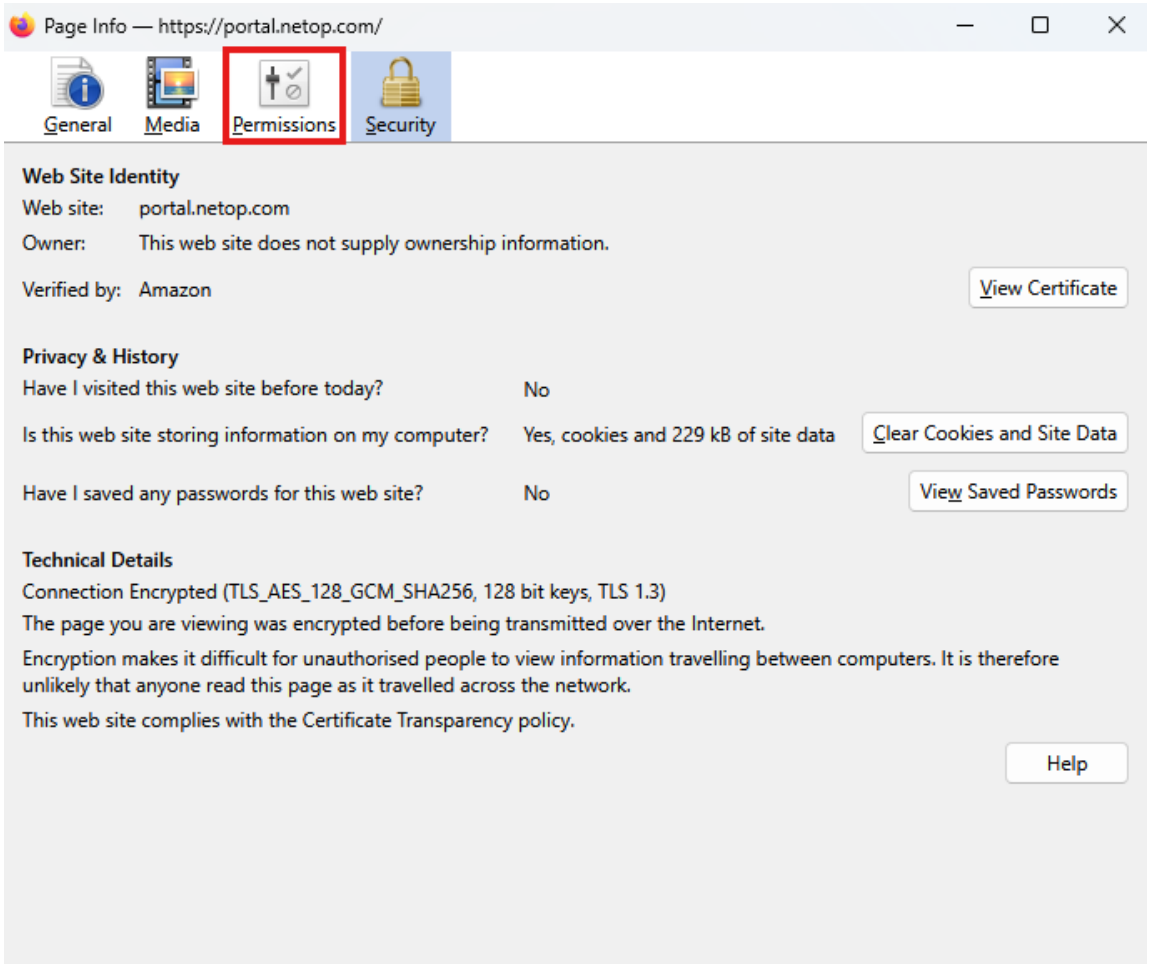
4. Click on the **arrow** button.



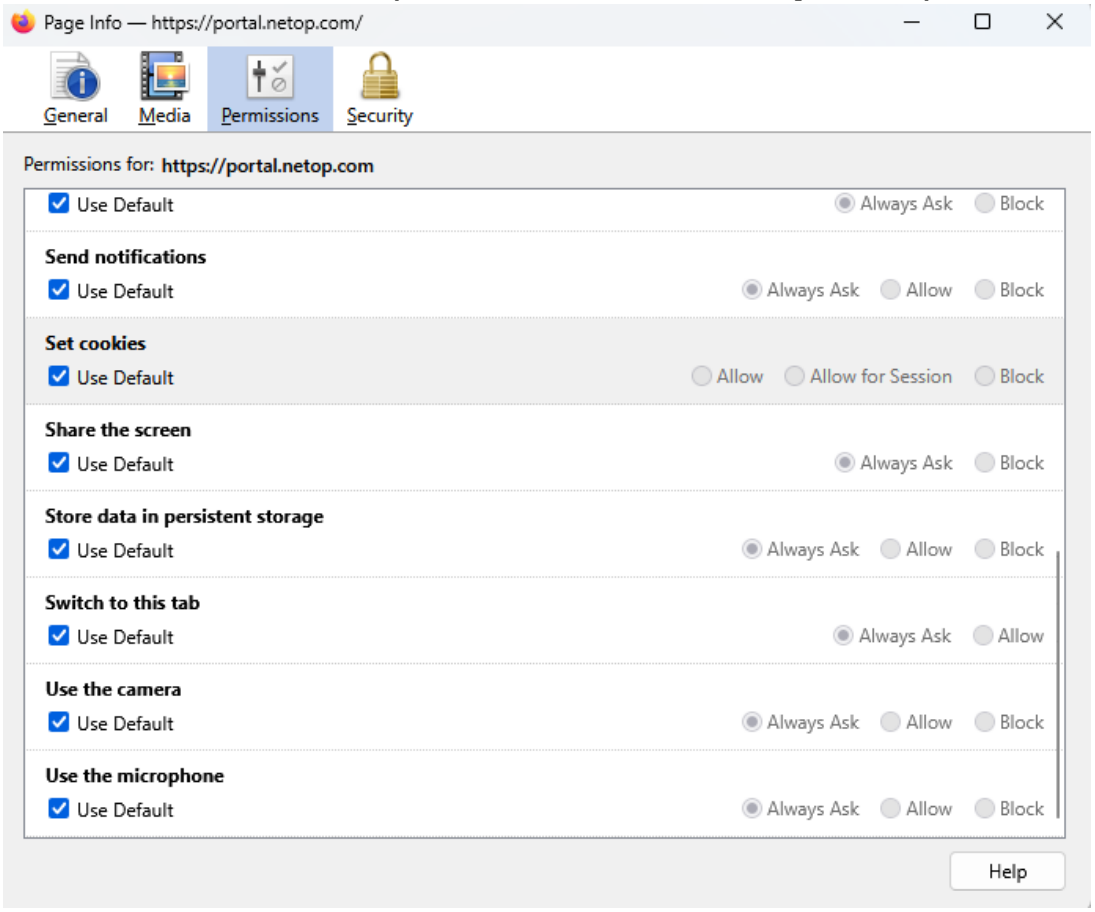
5. Click on the **More information** button.



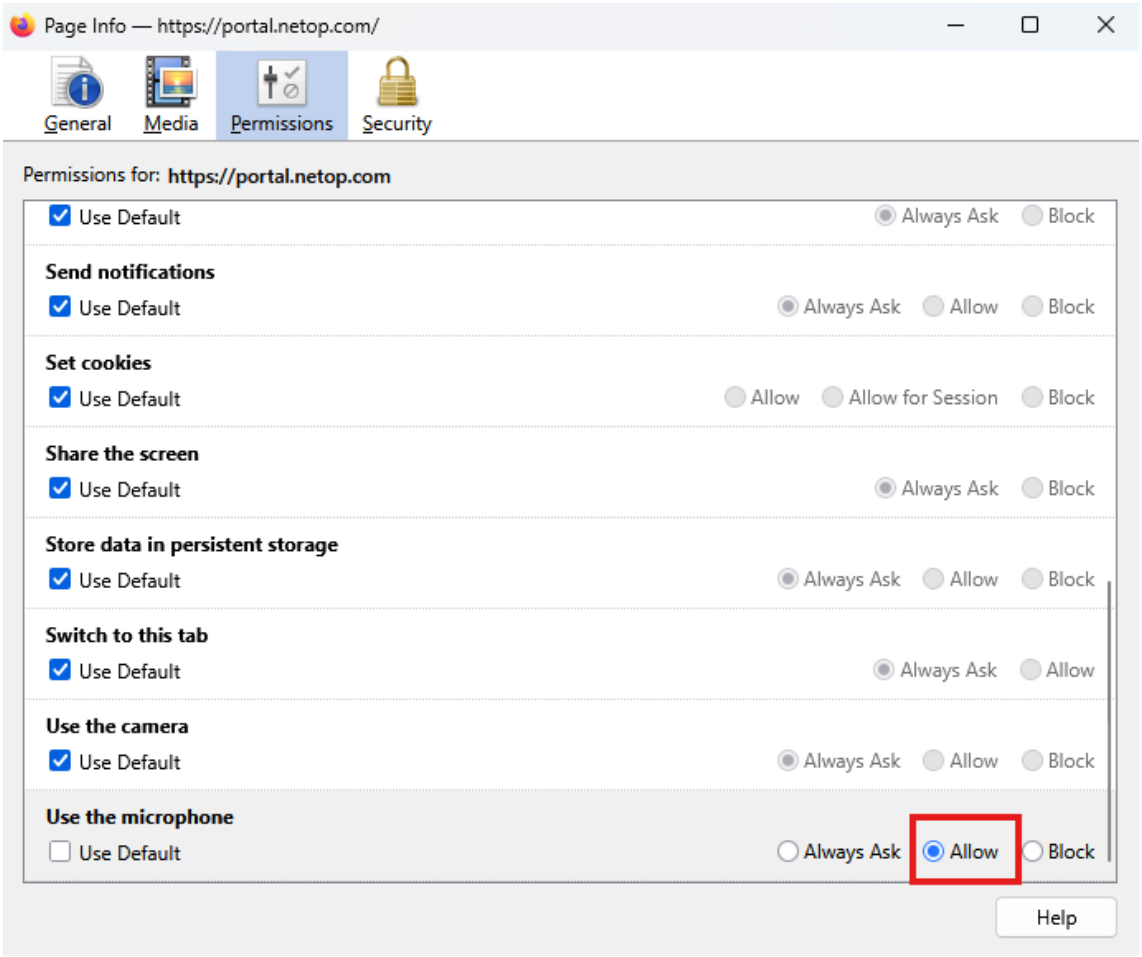
6. Click on the **Permissions** icon.



7. Uncheck the "**Use default**" option for the **Use Microphone** permission.

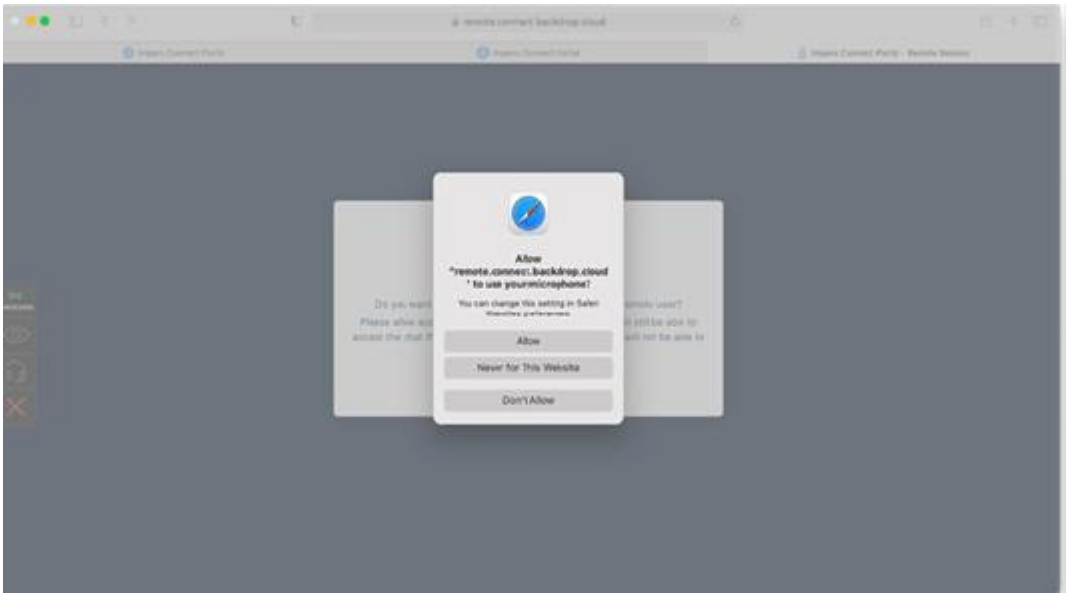


8. To enable the **Use the Microphone** permission, select the **Allow** option.



- **For Safari**

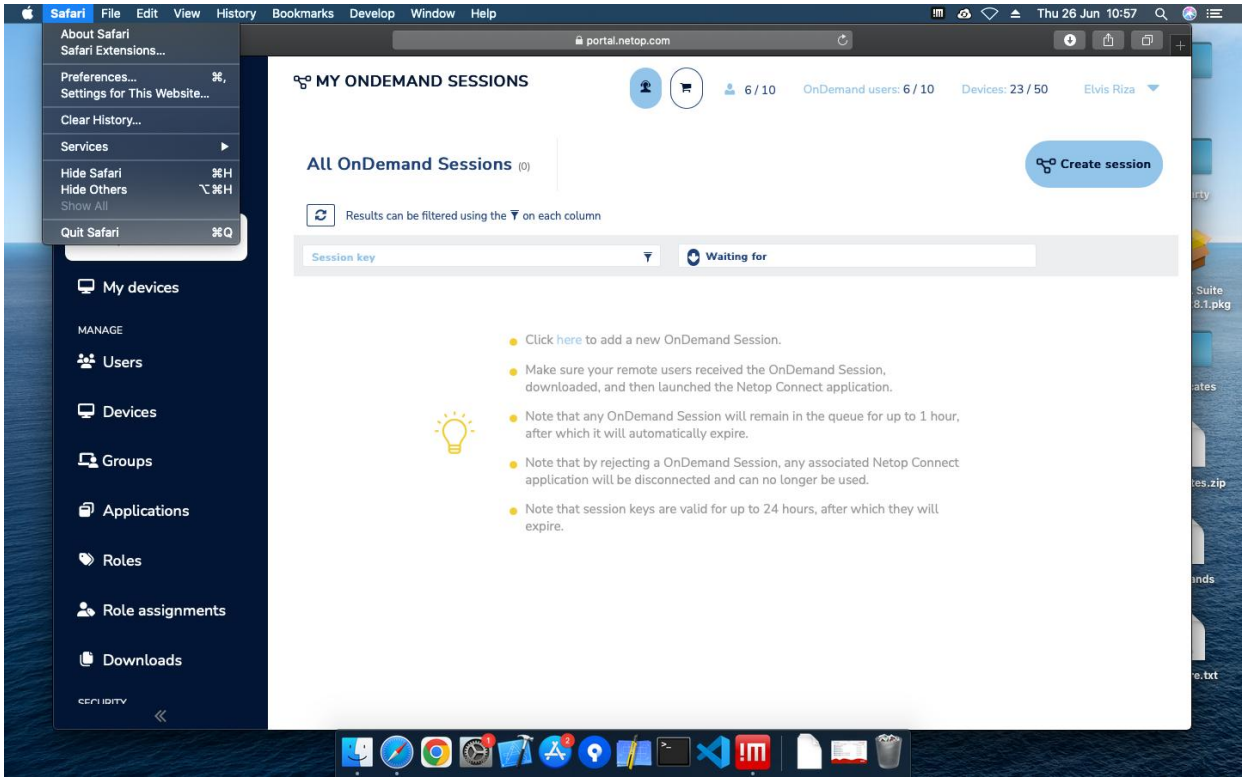
When a user initiates the audio chat feature, the **Safari** browser displays a pop-up notification that requires you to allow or deny **Microphone** use. Click on the **Allow** button, to use the Microphone.



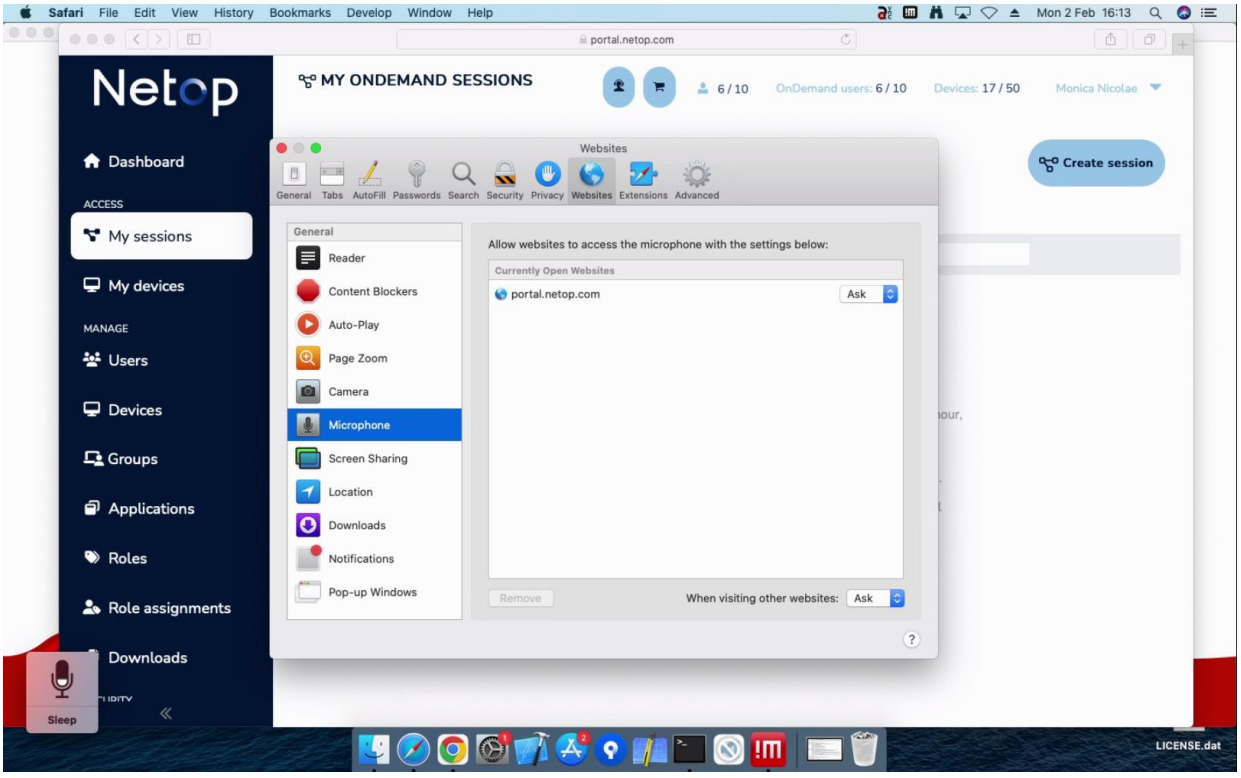
Alternatively, to manually allow the use of the **Microphone**, proceed as follows:

1. Open the **Safari** Internet browser.
2. In the address bar, specify **`portal.netop.com`**.
3. Click on **Safari**.

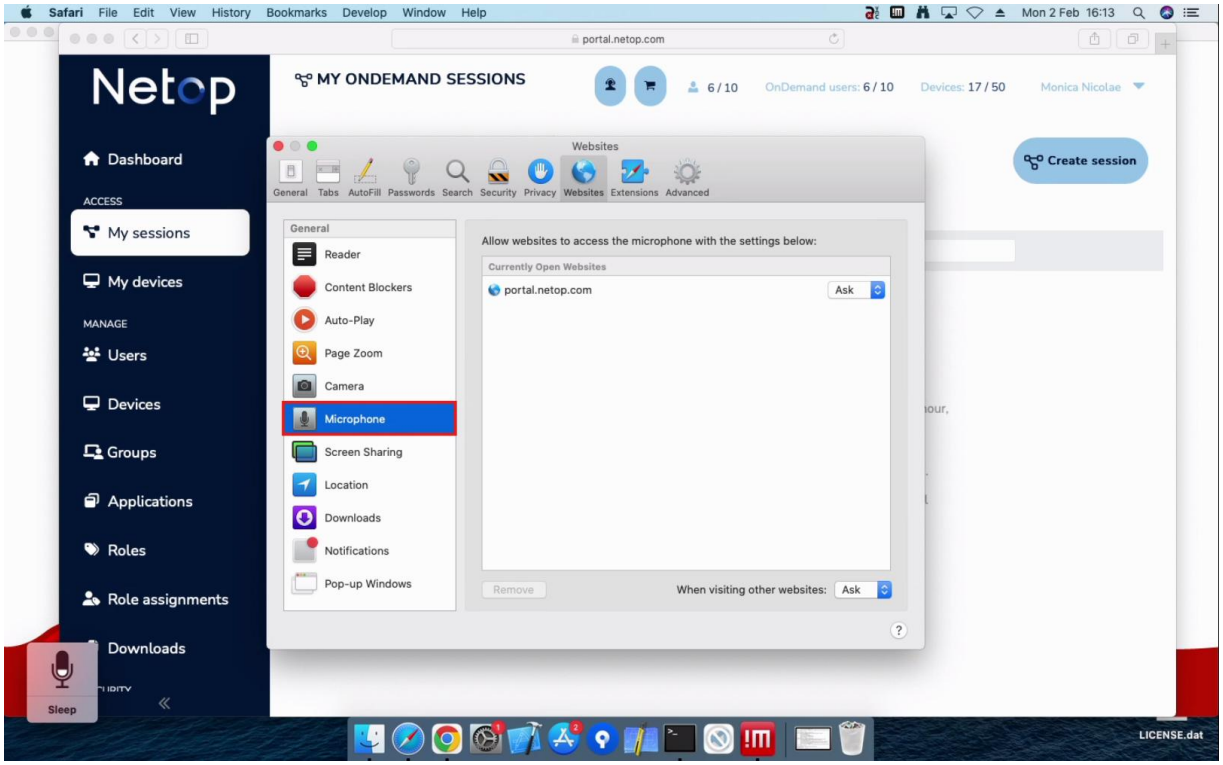
4. Go to **Preferences**.



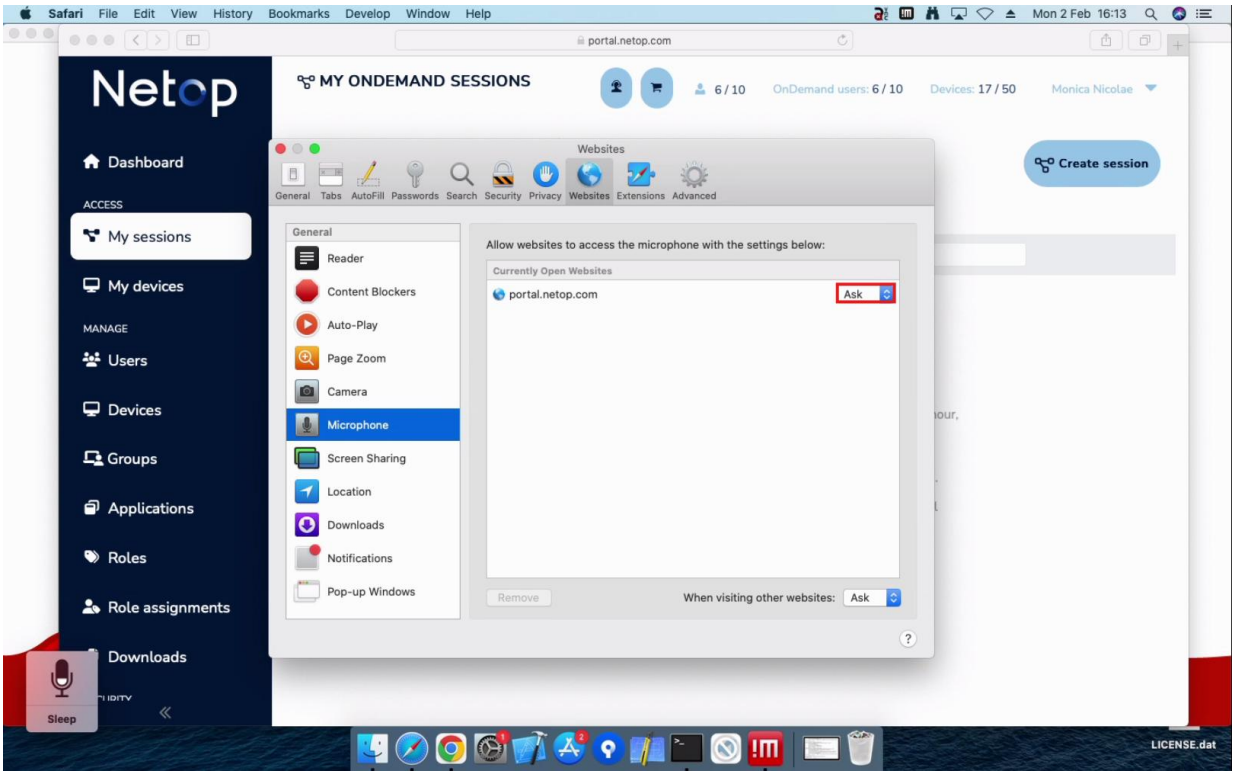
5. Click on the **Websites** icon.



6. Click on **Microphone**.



7. Click on the dropdown button near the **`portal.netop.com`** address.



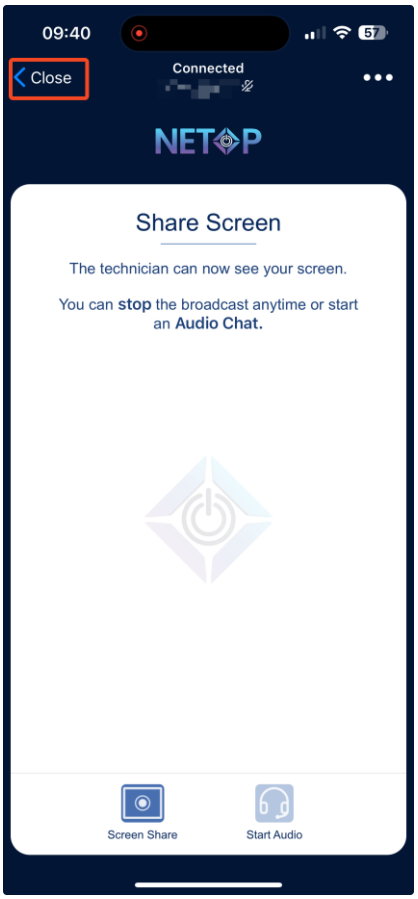
8. Select **Allow**.

To stop the **OnDemand** session, proceed as follows:

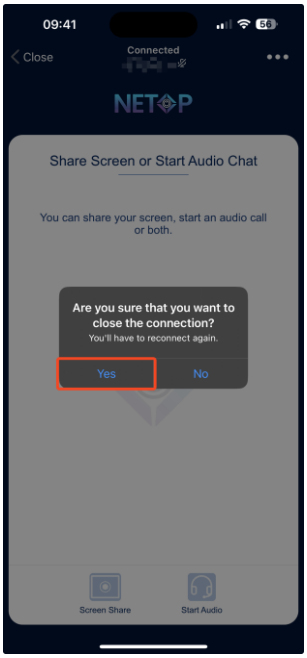
1. Click on the **Stop Broadcast** button to stop broadcasting your screen.

NOTE: The **OnDemand** session is still available. To start broadcasting your screen again, click on the **Start Broadcast** button.

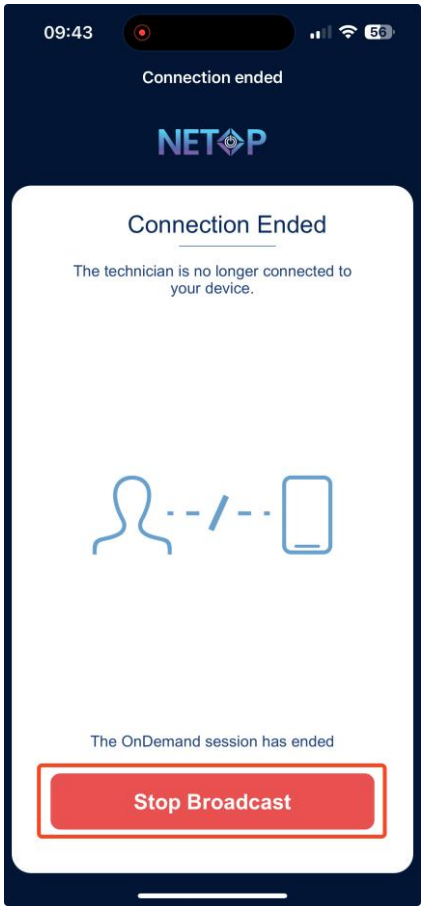
2. Click on the **Close** button to disconnect from the **Portal**. You receive a prompt to confirm to disconnect from the **OnDemand** session.



3. Click on **Yes** to close the connection.



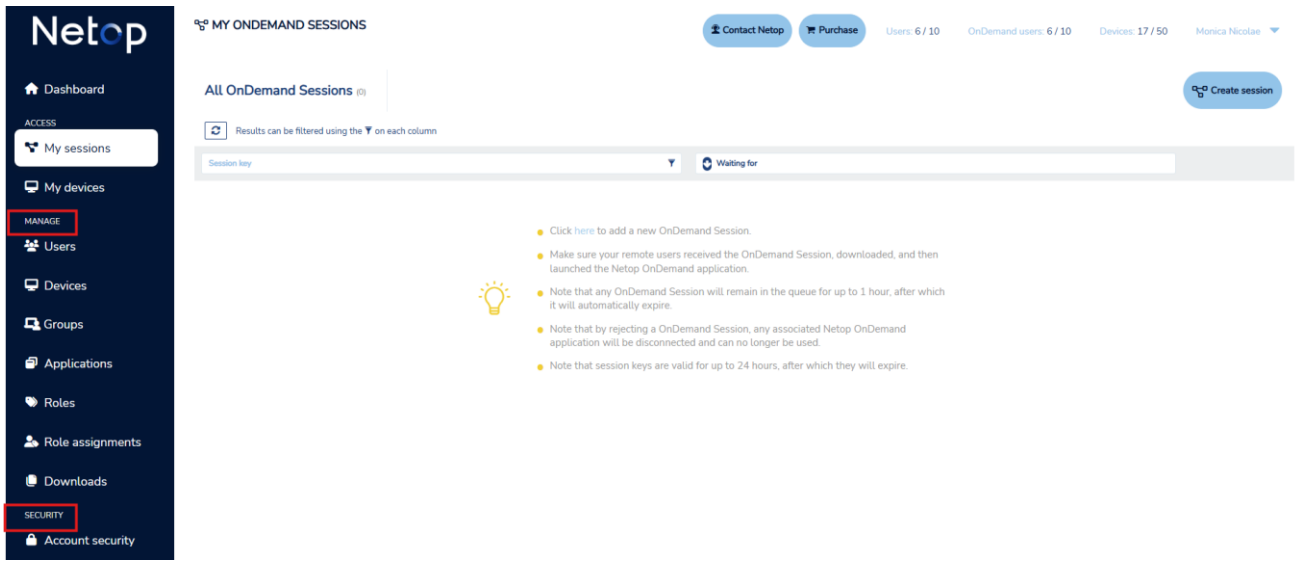
4. Click on the **Stop Broadcast** button to close the **OnDemand** client.



4 How to manage your account

The **Portal** provides a central place for managing users, devices, security settings, role-based access, audit logs and a variety of options.

If the logged-in user has a **Group Manager** role or higher, a Manage and Security areas in the sidebar menu are available.

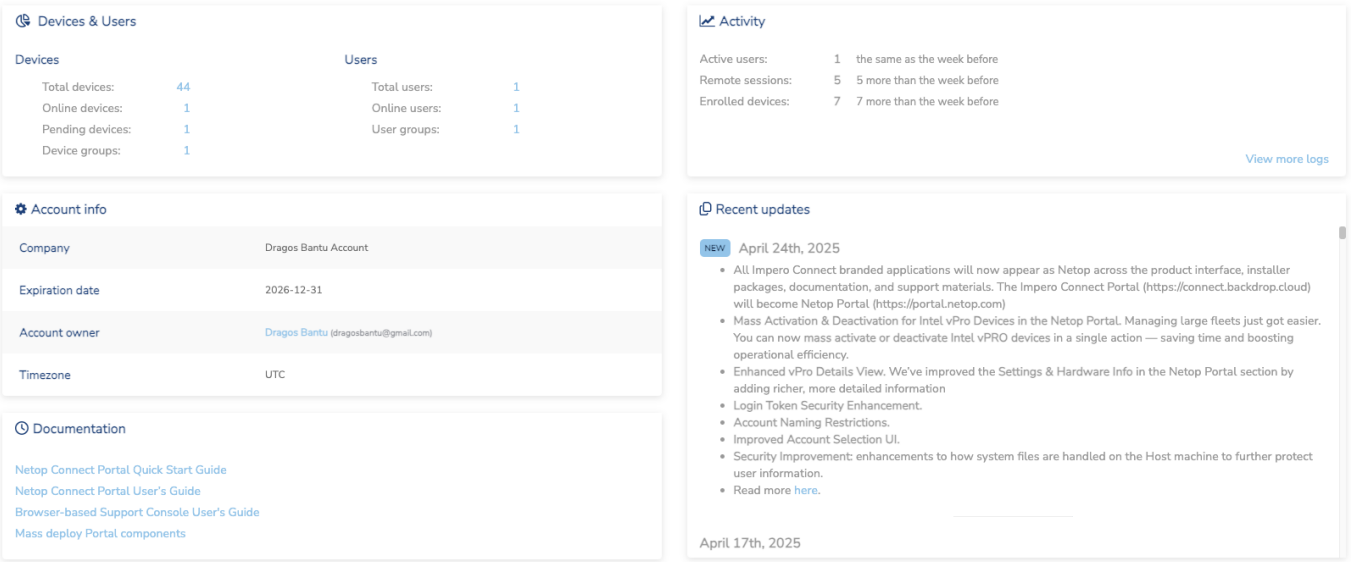


This provides access to the management area. The homepage for the management area is the **Dashboard** with various information including devices and users, account information, activity information, and recent updates.

The expiration date from the **Account info** section turns red when the account subscription is about to expire.

Account Owners are notified as follows:

- For regular accounts you are notified when there are **15** days or less until the subscription expires
- For trial accounts you are notified when there are **7** days or less until the subscription expires



NOTE: The user's access varies within the management area based on the user's role. Upon login to the **Portal**, Account Owners, Account Administrators, and Group Managers are redirected to the **Dashboard** page, while Regular Users are redirected to the **My devices** page.

4.1 Manage Users

The **Portal** allows you to centrally manage users within your organization. This can be done by one or several users with administrative privileges.

The **Portal** interface provides easy access for managing the users.

There are four user types:

- **User** - view assigned devices and manage your profile
- **Group manager** – all the permissions of the User, plus the ability to manage users and devices, view roles and role assignments, view and generate log reports

- **Account administrator** – manage users, devices, groups, roles and role assignments, authentication methods, plus the ability to view account details and manage deployment packages
- **Account owner** – all the permissions of the Account Administrator plus the ability to manage the Account configuration

To view information about the users who have access to the **Portal**, on the menu bar click on the **Users** tab. The list of users is displayed.

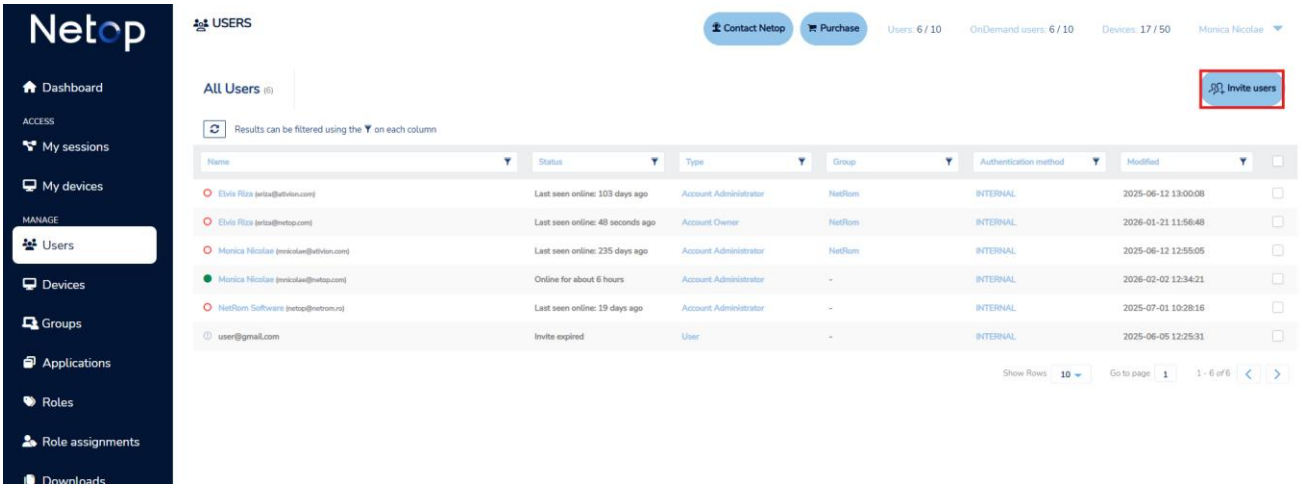
Refer to the Portal user privileges knowledge base article for the detailed list of access privileges.

4.1.1 Create a new user

As a **Group manager** or higher, you have access to invite users to your portal organization account via email.

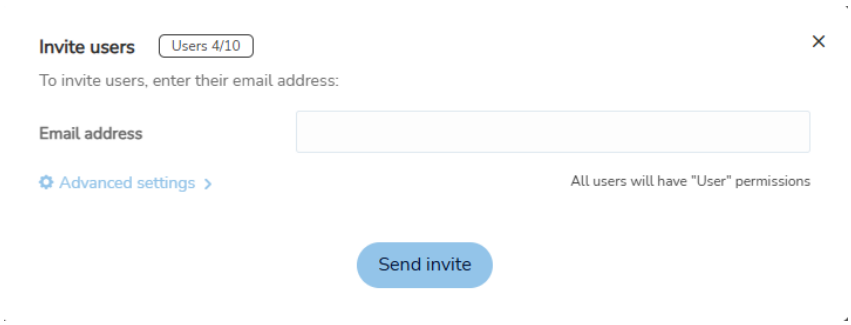
To create a new user, proceed as follows:

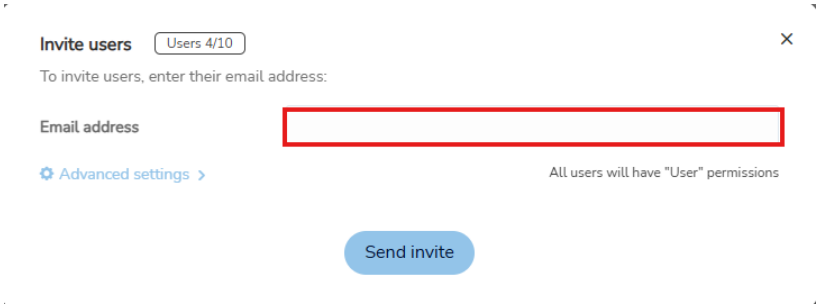
1. Go to the **Users** tab.
2. Click on the **Invite users** button.



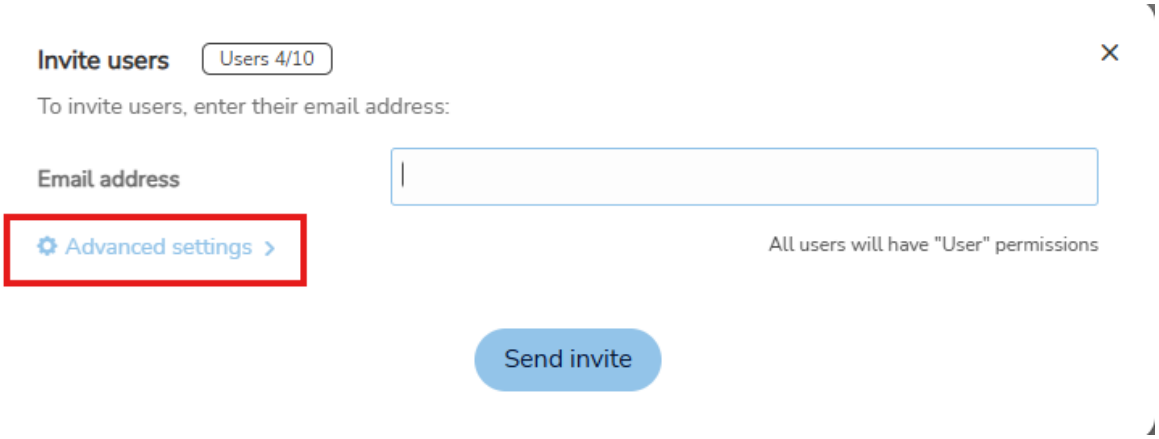
The **Invite users** form is displayed.

3. Specify the email addresses of the users you want to invite to the **Portal** account in the **Email addresses** entry field. You can specify it manually or by copy and pasting a list of emails.



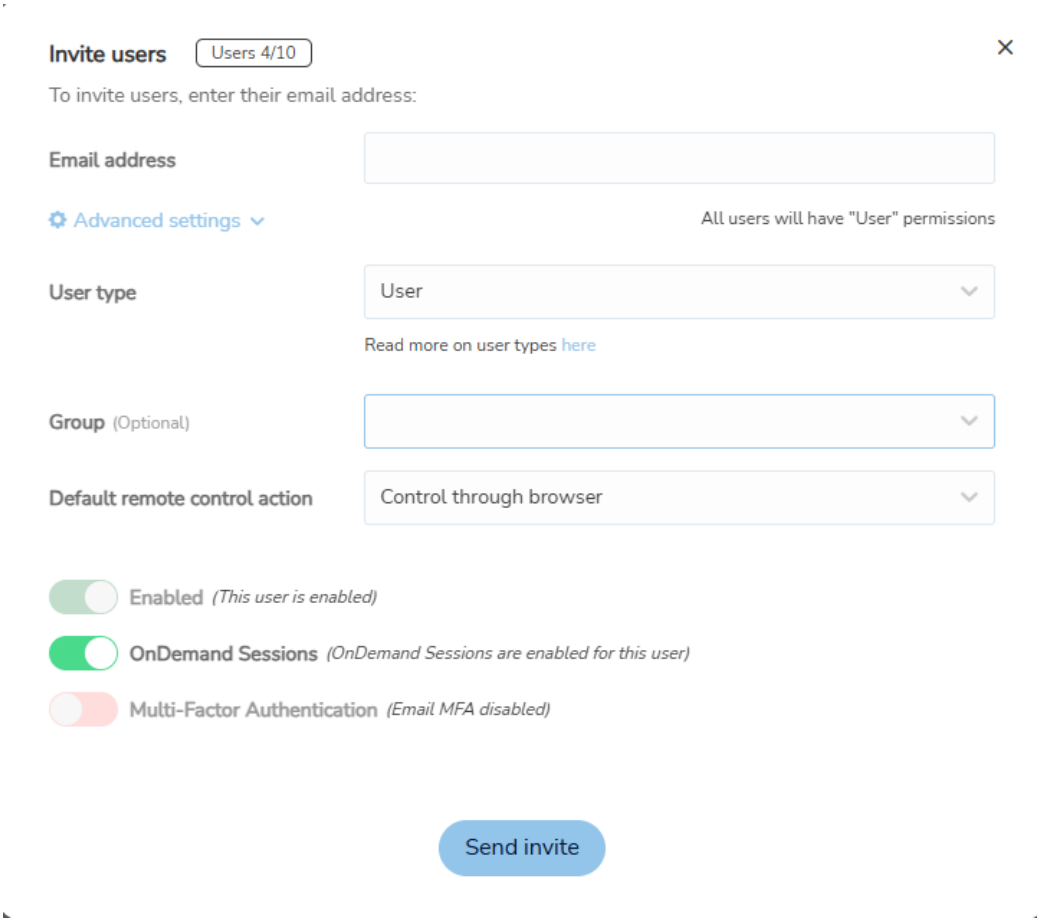


4. Click on the **Advanced settings** drop-down button to specify additional information about the invited users. Note that the **Advanced settings** apply to all invited users.

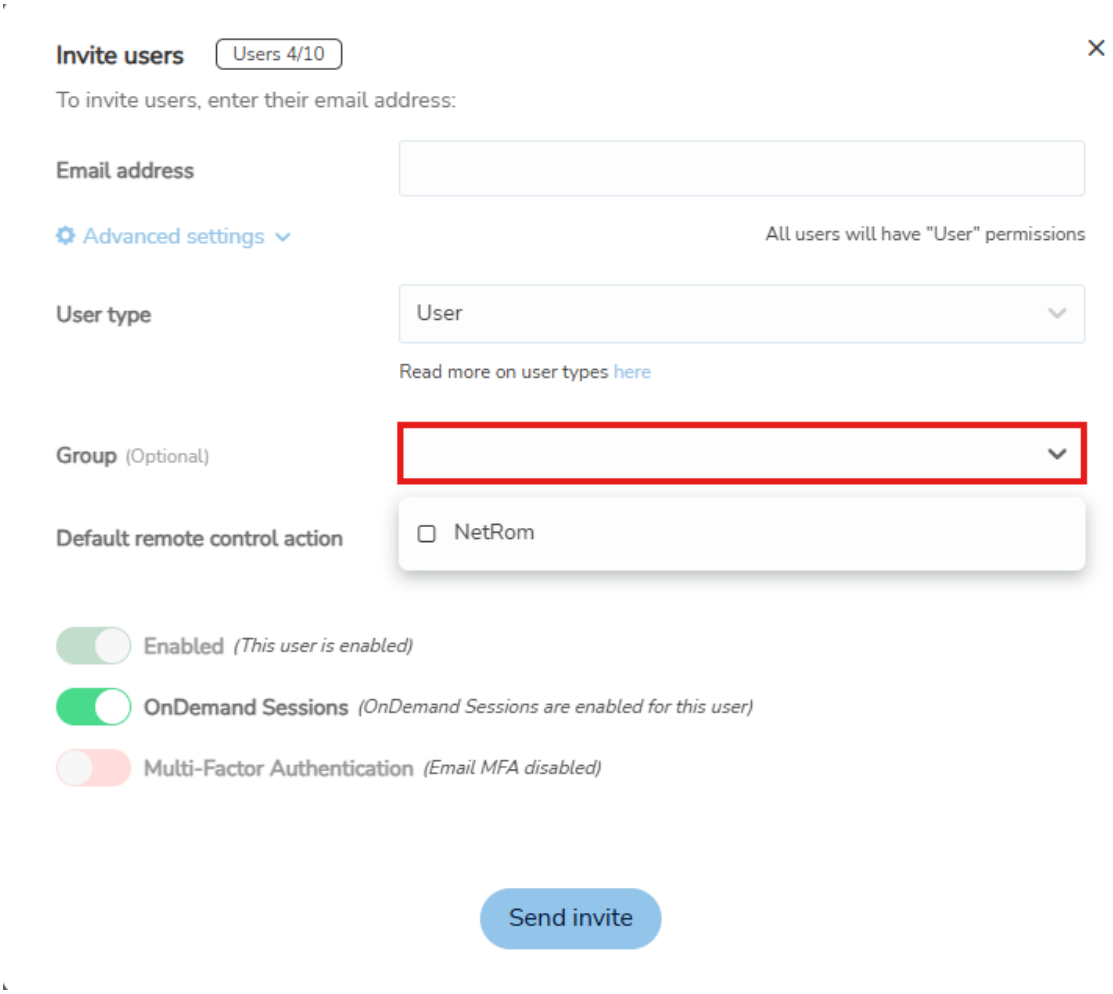


5. Select a **User type** for the invited users from the **User type** drop-down field.

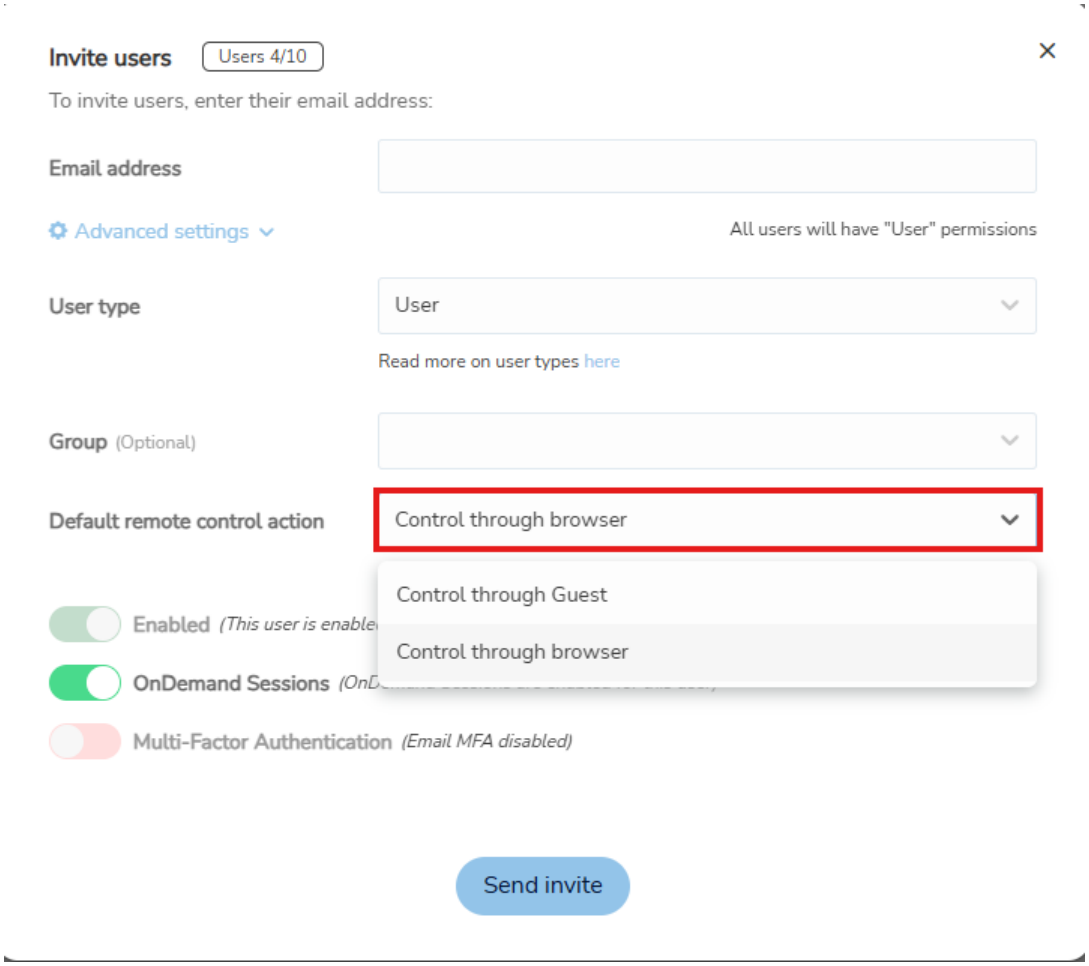
   NOTE: By default, all users are assigned the "**User**" type.



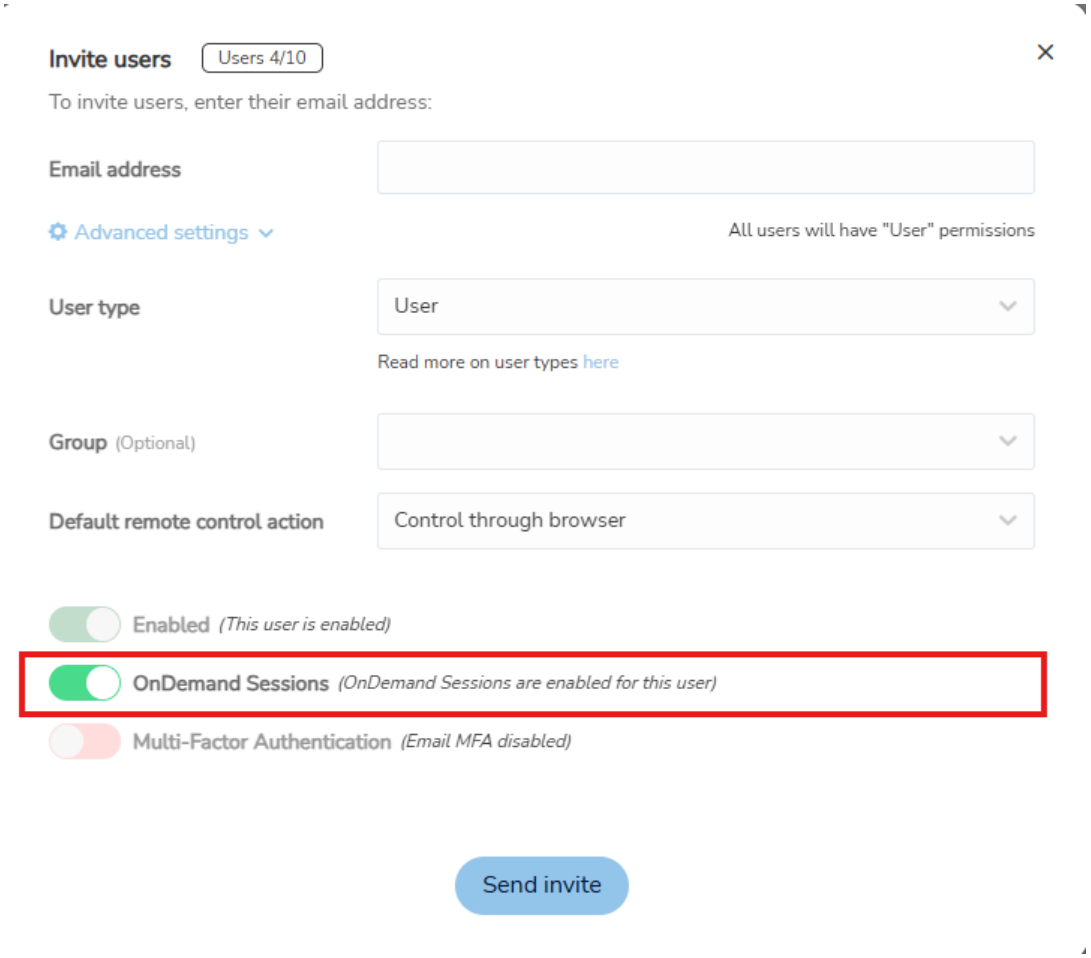
6. Optionally, you can select a group for the invited users from the **Group** drop-down button.



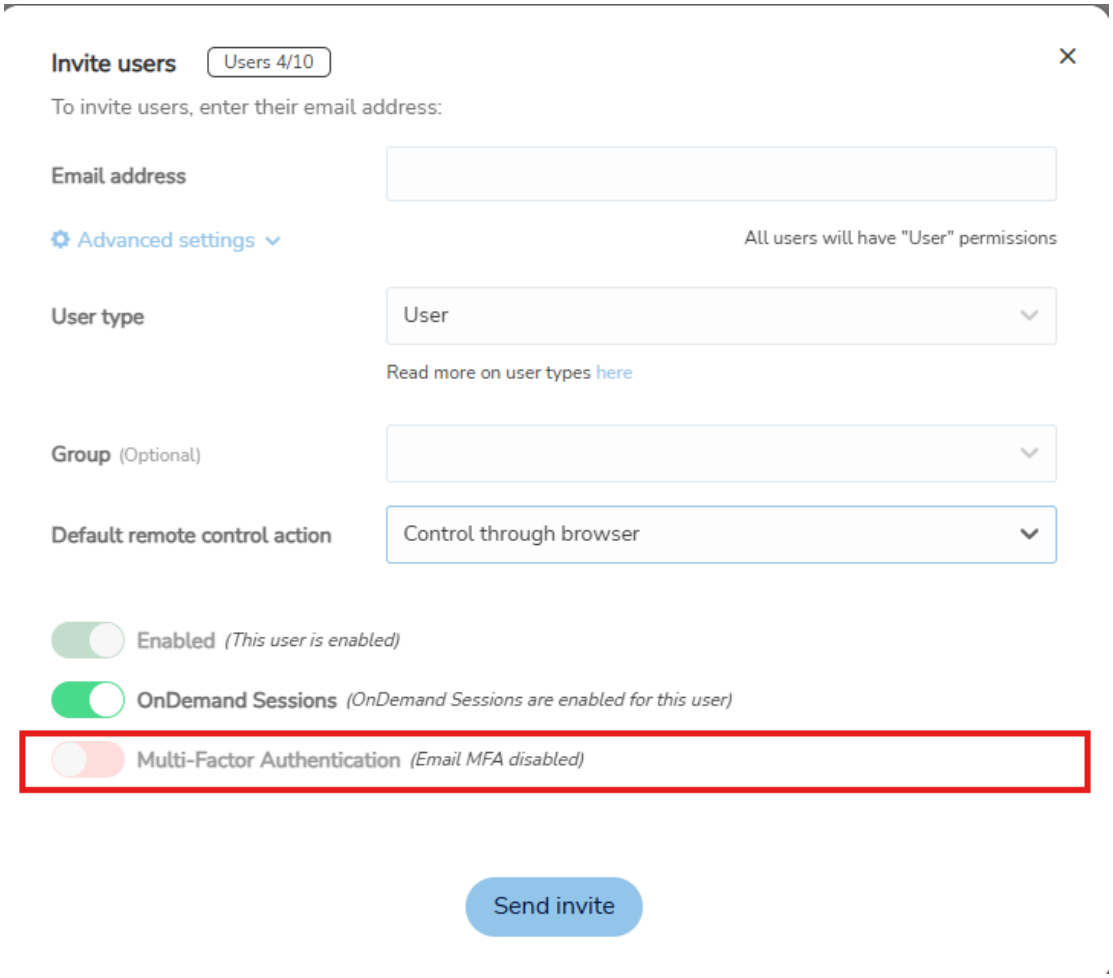
7. Select a default remote control action from the **Default remote control action** drop-down field. By default, this option is the default setting on the account.



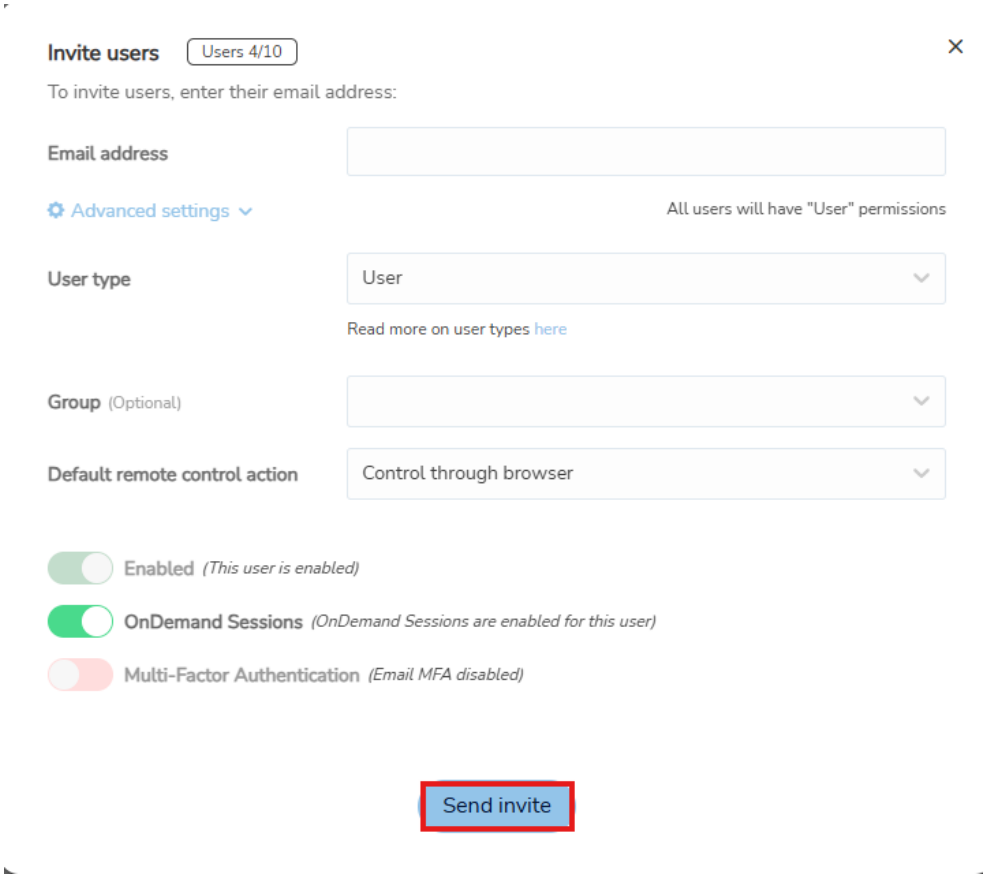
8. Enable or disable **OnDemand Sessions** for the invited users by clicking on the toggle button. By default, this option is enabled.



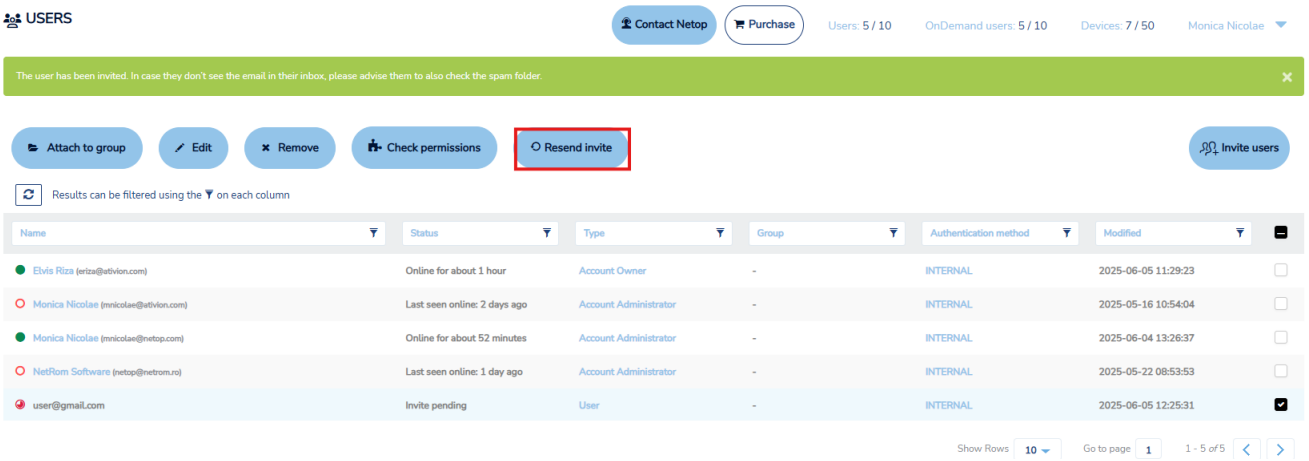
9. Enable or disable **Multi-Factor Authentication** by clicking on the toggle button. By default, this option is disabled.



10. To send the invitation, click on the **Send invite** button.

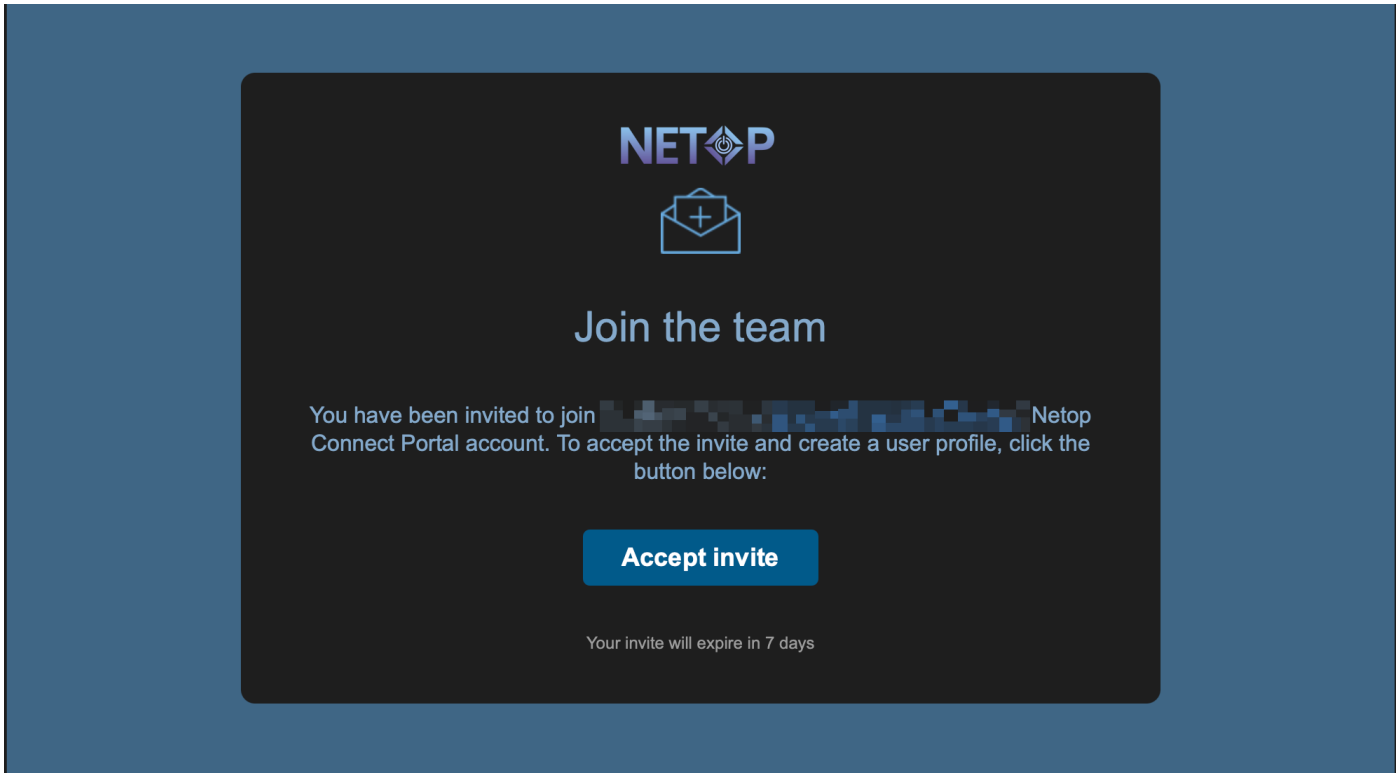


To resend the invitation email to users, simply select the invited users that you want to resend the invitation email to and then click on the **Resend invite** button.



NOTE: The invitation email can be resent for a maximum of **5** times and is valid for **7** days.

Invited users receive the invitation into the account via the specified email addresses:



After the users accept the invitation by clicking on the **Accept invite** button, they are automatically redirected to the **Set up your account** landing page.

To finish setting up the user account, click on the **Save & login** button.

4.1.2 LDAP users - automatically added into the Portal at first login

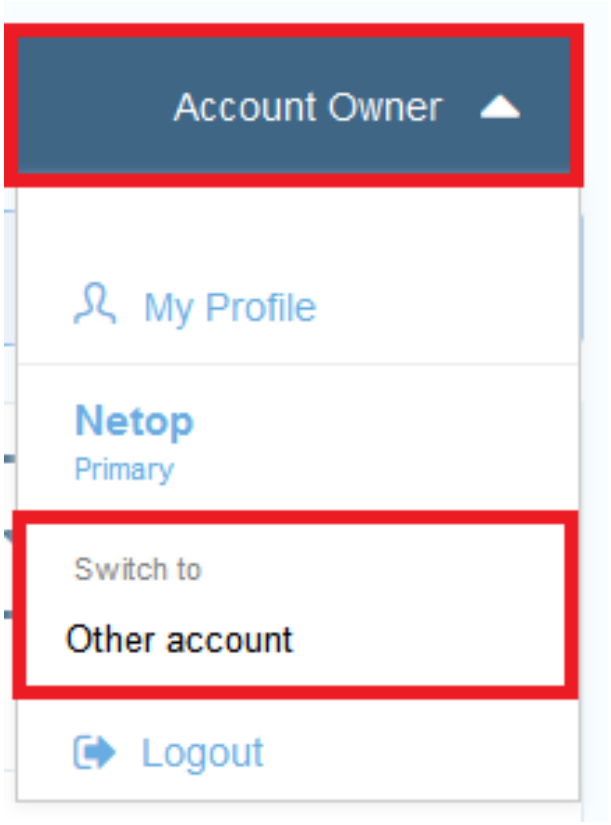
This only applies if you are using LDAP authentication. On the first login using the **LDAP** credentials (**username**: `domain identifier\LDAP username`, **password**: `the domain password`), the user is added to the **Portal**. The user type is **User** (more information on the user types here).

NOTE: The user is not attached to a group by default, but if there is a role assignment in the **Portal** which allows all the users to access all the devices (User: `everyone`, Devices: `everything`), the **LDAP** user has access to all devices. Refer to the LDAP user groups sub-chapter to attach the User to a Group on login.

4.1.3 Multiple accounts

Users can belong to multiple **Portal** accounts when invited via email by an **Account Owner**, **Account Administrator**, or **Group Manager** to a secondary **Portal** account.

Users that belong to multiple **Portal** accounts can switch between them. They do so by clicking on the **User Profile** button and selecting the secondary account that they want to switch to.

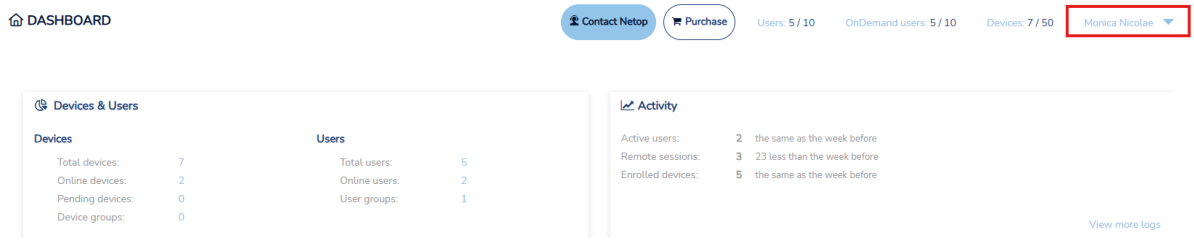


By default, the primary account is the account that the user was first invited to. User settings are not transferred from the primary to any other secondary accounts. As such users can have different permissions, roles, or other settings on other secondary accounts without them interfering with each other.

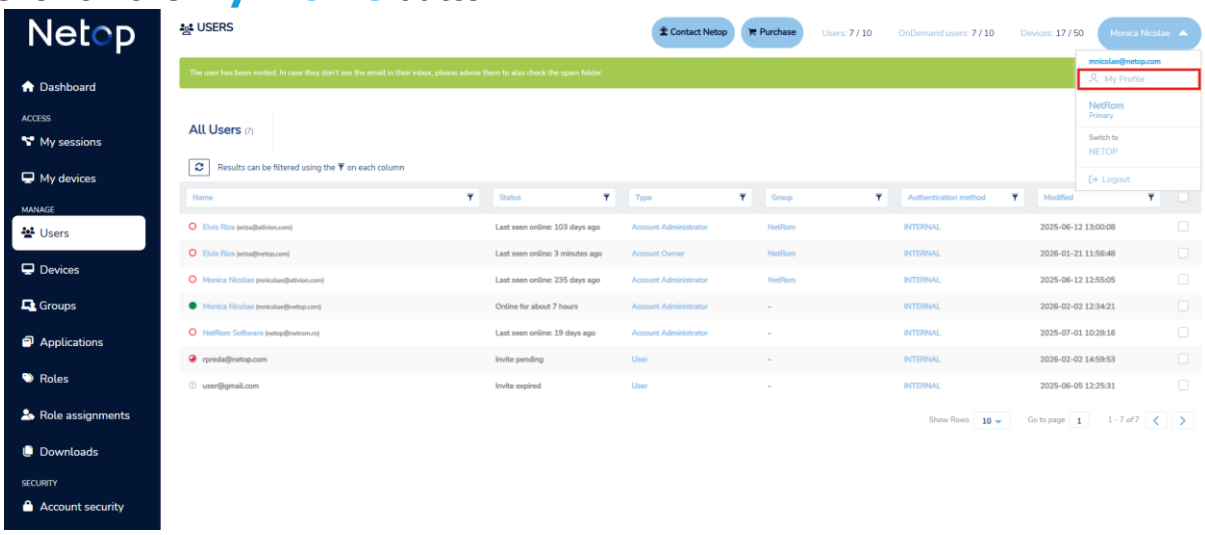
Users can set an account alias for the primary and secondary accounts.

To set an account alias, proceed as follows:

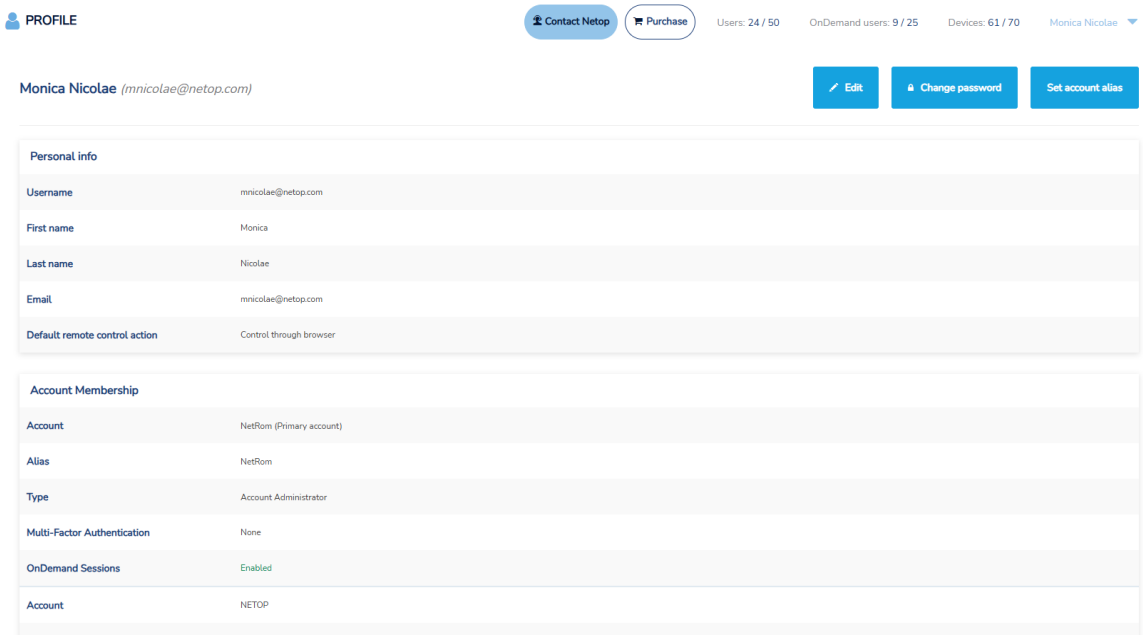
1. Click on the **User Profile** button.



2. Click on the **My Profile** button.

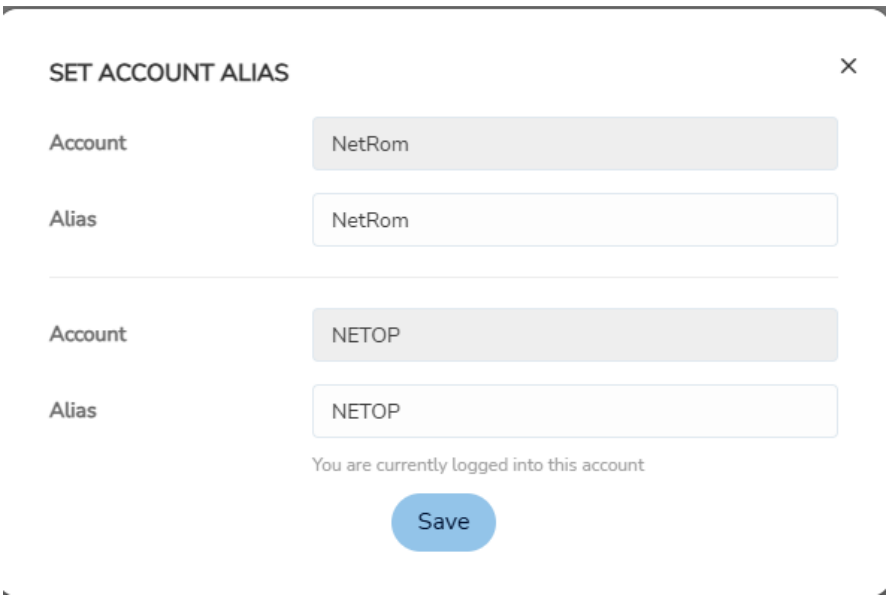


3. Click on the **Set account alias** button.

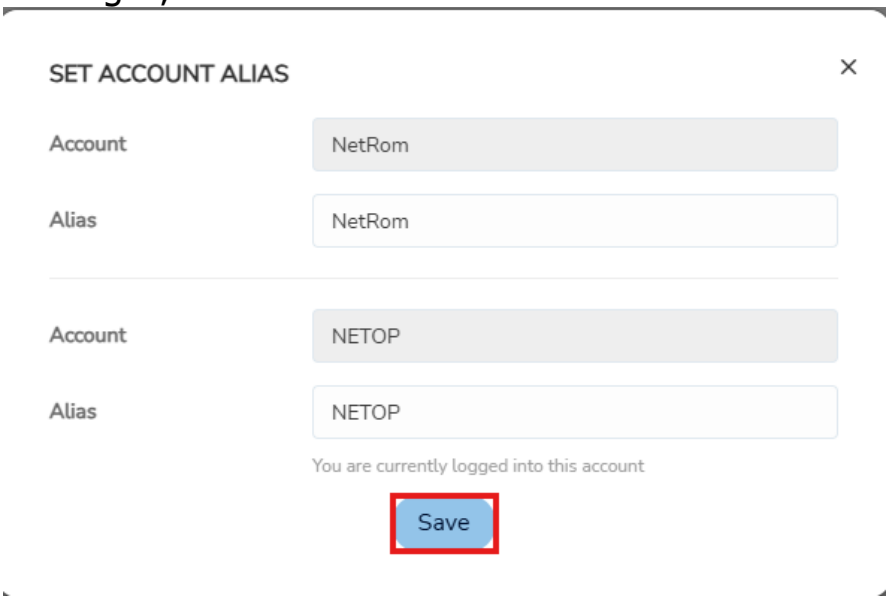


4.

5. Specify an alias for the accounts in the **Alias** text input field.



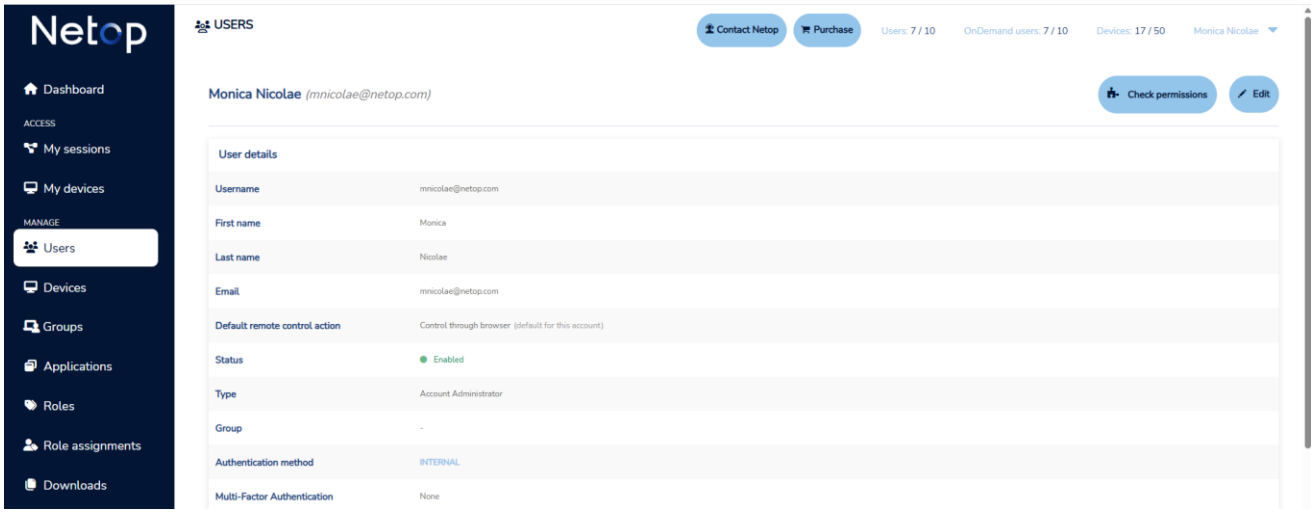
6. To save your changes, click on the **Save** button.



4.1.4 View User Info

To view user information, in the **Users** list click on the desired username.

Specific information from the user's profile is displayed.



Field	Description
Username	A unique identifier used to log in.
Status	Indicates whether the user is Online / Offline or if they cannot log in to the **Portal** (***Inactive***), as well as the period of time of the user while being Online/Offline. • **Online** = User is logged in the **Portal** • **Offline** = User is not logged in the **Portal** • **Inactive** = User is disabled and cannot log in the **Portal**.
First Name	User's first name.
Last Name	User's last name.
Email	The email address to which the user receives notifications from the **Portal** and the multi-factor authentication code if enabled.
Group	The group the user belongs to.
Authentication method	Internal (username or password) or the name of the authentication method defined under **Account** > **Authentication**.
Multi-factor authentication	Indicates if multi-factor authentication is enabled for the user or not.
Type	Indicates the type of the account: **Account Owner**,

Field	Description
	Account Administrator, **Group manager** or **User**.
Default remote control action	Sets up the default remote control action for the user.
Created	The date and time when the user account was created.
Created by	The first and last name of the user who created the user account.
Modified	The date and time when the user account was last modified.
Modified by	The first and last name of the user who last modified the user account.

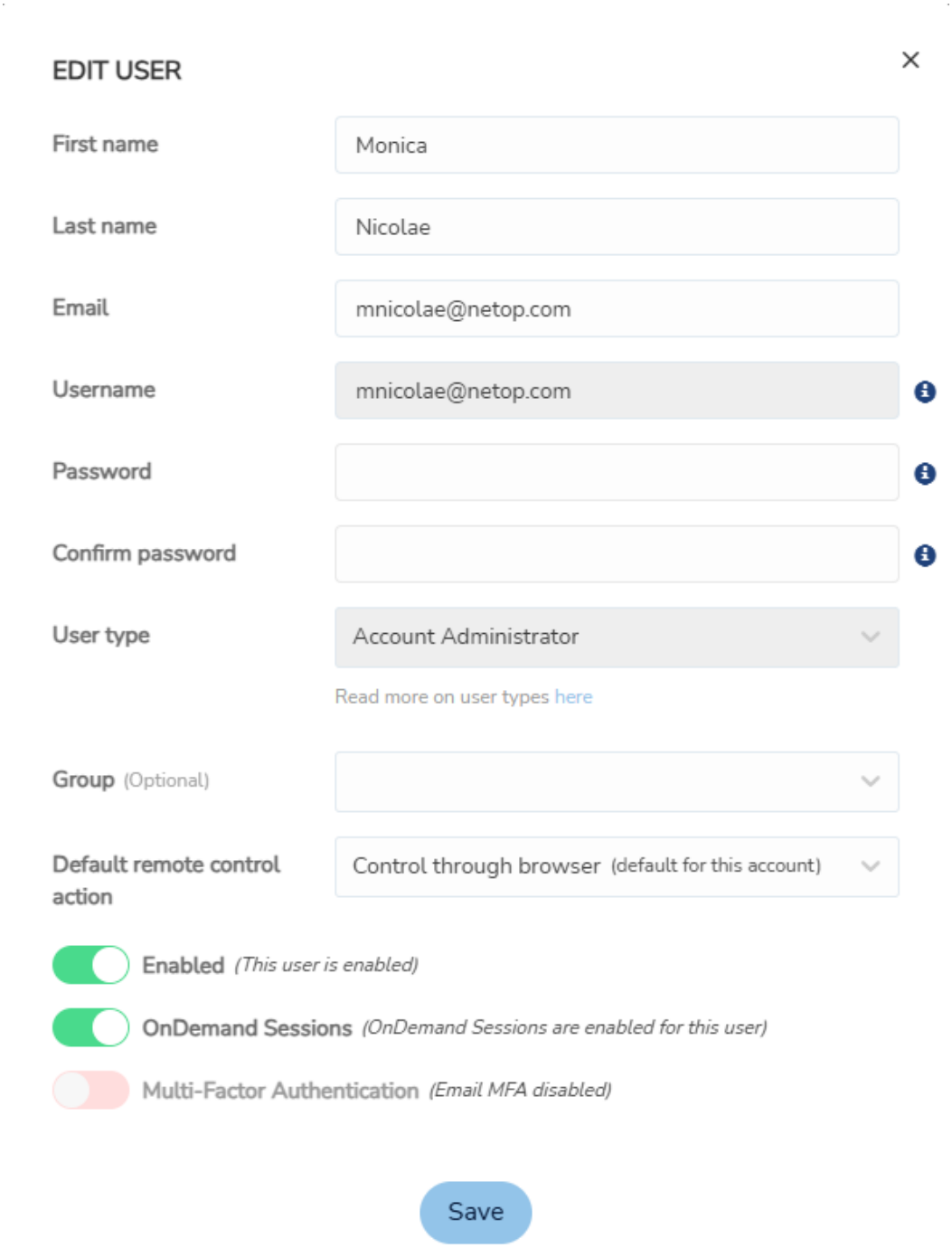
4.1.5 Edit the user

To edit an existing user, in the **Users** area click on the username of the user you want to modify and in the upper right corner of the page click on the **Edit** button. The **Edit User** window is displayed.

Depending on the authentication method of the user, edit user is as follows:

For Internal authentication, you can modify the following:

- Basic profile information (such as **First Name**, **Last Name**, and **Email**)
- Access permissions (toggle on or off the **Active** button and select the user type to give specific access permissions within the **Portal**)
- Select the groups the user belongs to and whether the user authenticates using **multi-factor authentication** or not
- Set up the default remote control action


EDIT USER
First name
Monica
Last name
Nicolae
Email
mnicolae@netop.com
Username
mnicolae@netop.com
Password
Confirm password
User type
Account Administrator
Read more on user types here
Group (Optional)
Default remote control action
Control through browser (default for this account)
Enabled (This user is enabled)
OnDemand Sessions (OnDemand Sessions are enabled for this user)
Multi-Factor Authentication (Email MFA disabled)
Save

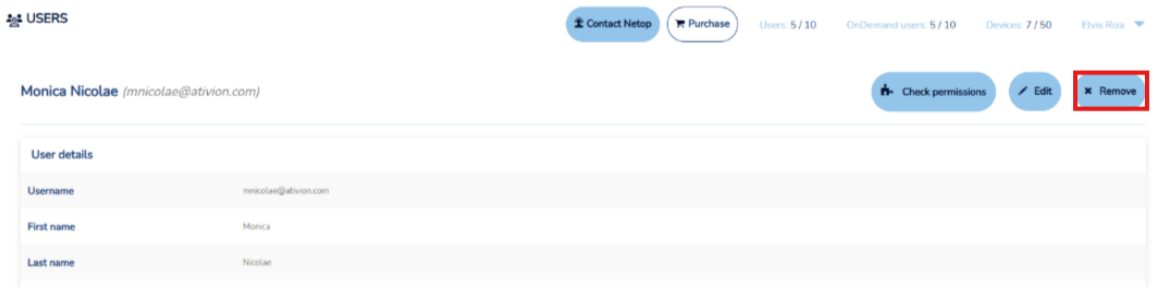
NOTES:

- If you toggle off the **Active** button, it disables the users so they can no longer log in to the **Portal**. Disabling does **NOT** remove the user from your Portal organization account.
- You are not allowed to edit the username.
- You are not allowed to edit a user whose role is higher than the user you are logged in as.
- You are not allowed to change the role of an Account Owner from here. Use the account configuration area instead.
- For **ADFS / Azure AD based authentication**. You can modify the role (toggle on or off the **Active** button and select the user type to give specific access permissions within the **Portal**), select the groups the user belongs to and whether the user authenticates using multi-factor authentication or not, or set up the default remote control action.

Once you have finished updating user information and access permissions, click on the **Save** button to save the user updates.

4.1.6 Remove user

To remove an existing user, in the **Users** area, click on the username of the user you want to remove and in the upper right corner of the page, click on the **Remove** button.



NOTE: Only an **Account Owner**, **Account Administrator** or **Group Manager** can remove users. The logged-in user can only remove users with roles below their role.

You can also remove an existing user, from the **Users** area by selecting the desired user and above the content area click on the **Remove** button.

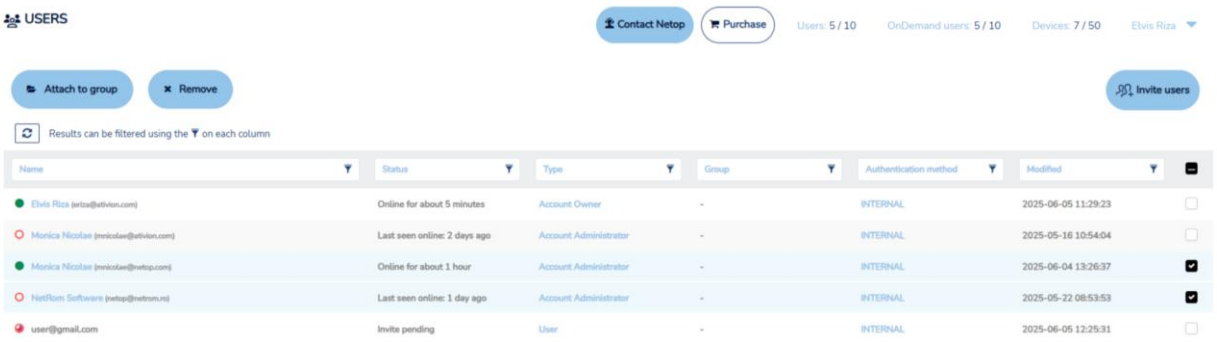
A confirmation dialog is displayed. To remove the selected user, click on **Yes**.

NOTE: For users that belong to multiple accounts, when removing them from their main **Portal** account, they are automatically removed from their secondary accounts as well.

4.1.7 Remove multiple users

To remove multiple users at once, in the **Users** area, select the users you want to remove and above the content area, click on the **Remove** button.

A confirmation dialog is displayed. To remove the selected users, click on **Yes**.



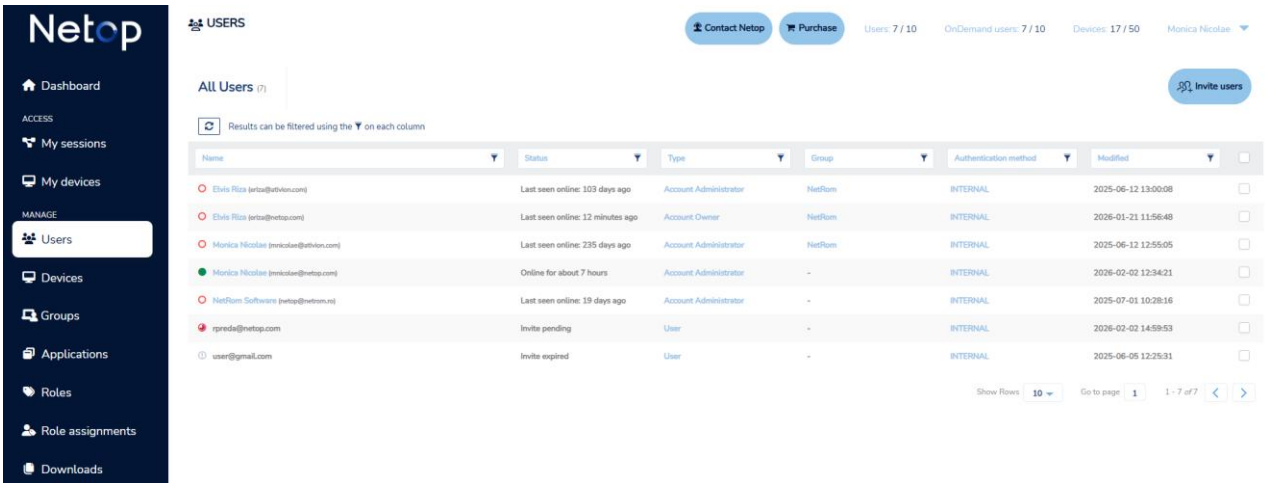
NOTE: If you remove an **LDAP**, **ADFS** or **Azure AD** user it does not mean that the user is not able to log in again. On the next login, the user is created again. To disable the user, edit the user and set the status to inactive.

4.1.8 Set up the default remote control action

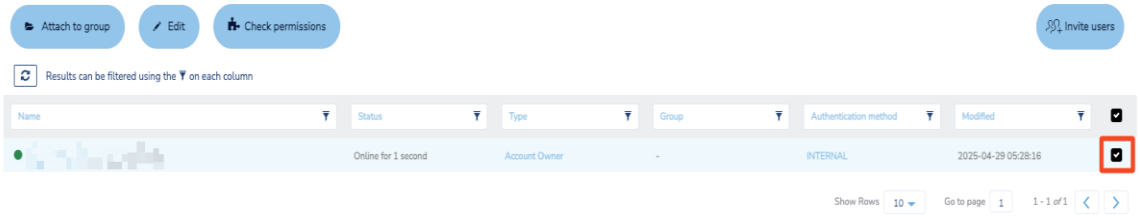
In the **Portal** you can set up the default remote control action for each user or for all the users that belong to the account.

To set up the default remote control action for a user, proceed as follows:

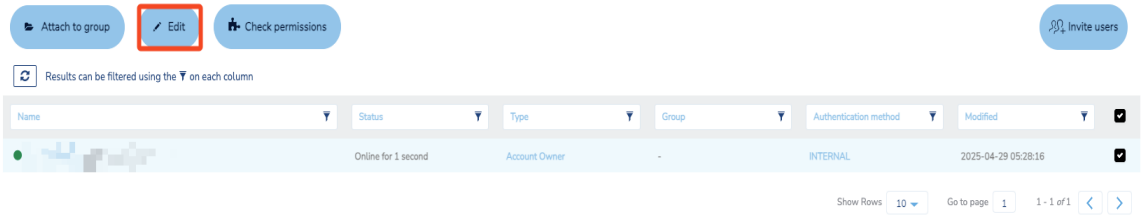
1. Go to the **Users** tab.



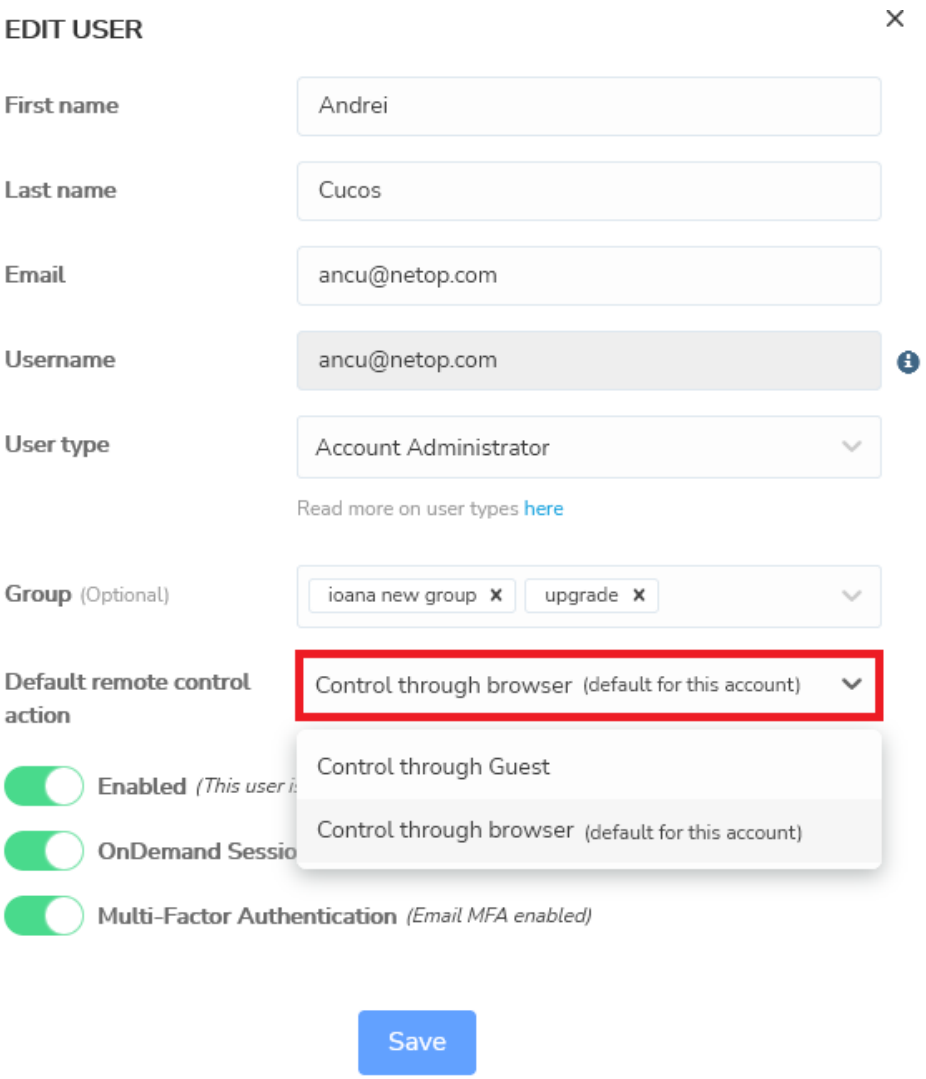
2. Select the user you want to edit.



3. Click on the **Edit** button.

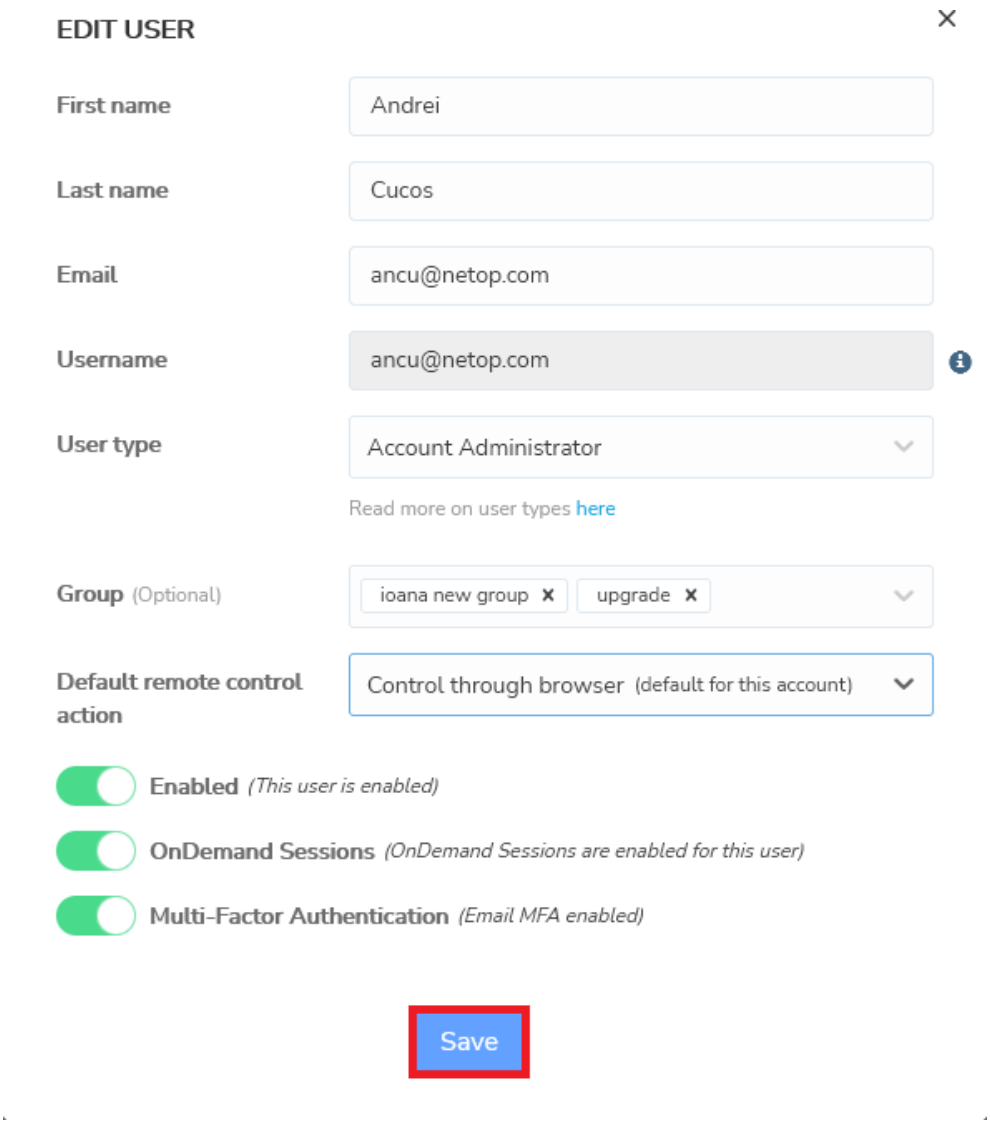


4. Click on the **Default remote control action** drop-down menu.



5. Select the default remote control action.

6. Click on the **Save** button to save your changes.



NOTE: An **Account Owner** can set up the default remote control action for all the users in the account. For more information refer to Account Configuration.

4.2 Manage Groups

The **Portal** allows you to group users and devices. Using these groups, role-based access can be applied:

- Create a local user group and attach users to the group
- Add an **LDAP** group (**LDAP** authentication method required)
- Add **Azure AD** user groups from the **Azure Portal** (**Azure AD** authentication method required)

- Create a device group and attach devices to the group
- Add role assignment to define permissions for a user group when connecting to a device group.

For more information refer to the Add role assignment sub-chapter.

4.2.1 Create a new group

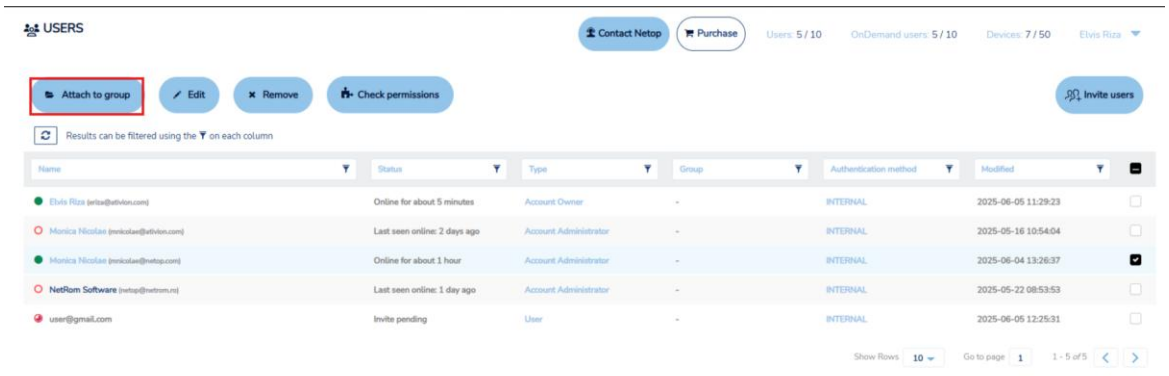
To create a user group, proceed as follows:

1. From the **Manage** > **Groups** tab, click on the corresponding **Add group** button to create a device group, an LDAP user group, Azure AD user group, or a local user group.
2. Provide the group name and group description and select whether the group is **Active** or not.
3. Click on the **Save** button. The group is successfully created.

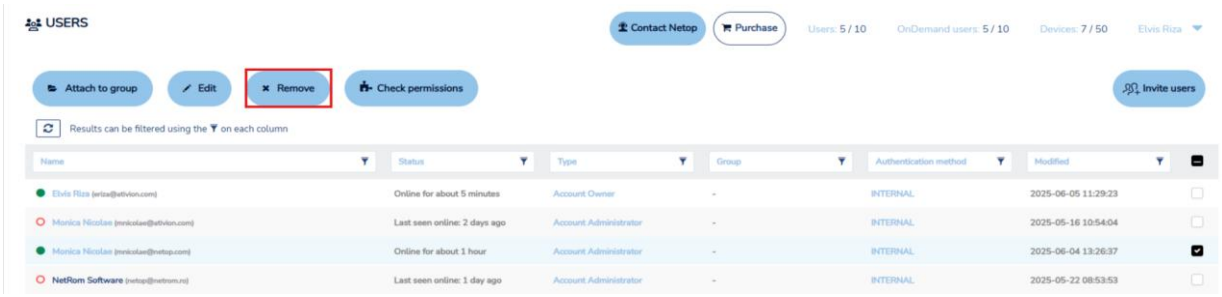
4.2.2 Attach users to user groups

To attach users to a user group, proceed as follows:

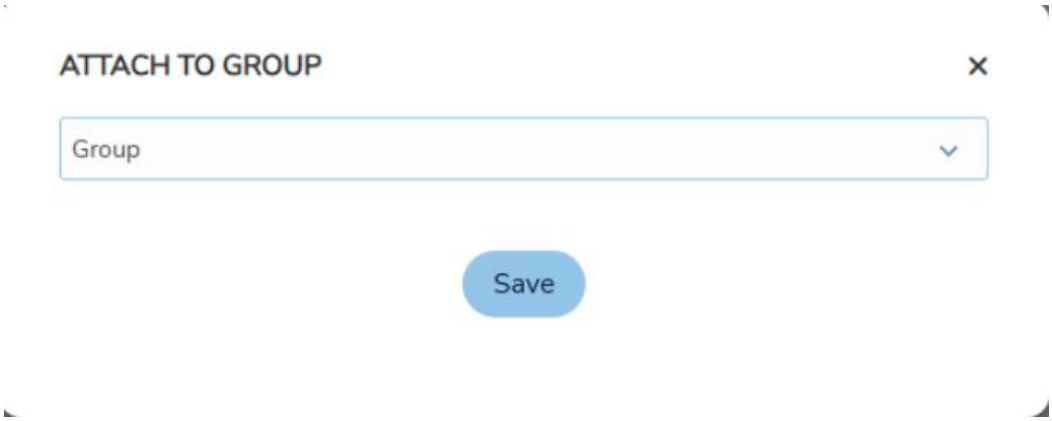
1. Go to the **Users** tab, select the desired user(s).
2. Above the content area, click on the **Attach to group** button. A window is displayed.



3. Select the group to which the user(s) belongs.



4. Click on the **Save** button. The selected user(s) belong(s) now to this user group as well.



NOTE: A user can be attached to multiple groups.

4.2.3 Add Azure AD user groups

Prerequisites:

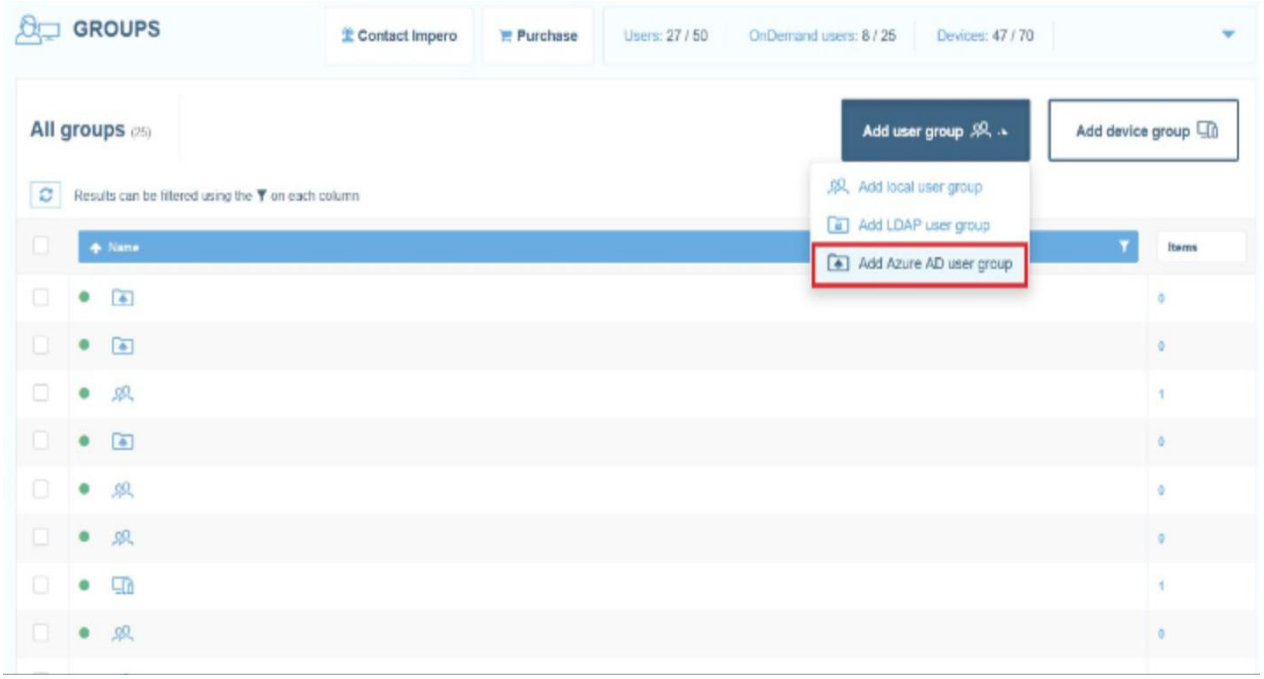
- The **Azure AD authentication method** is correctly set up and enabled. Refer to subchapter Enabling ADFS/Azure AD authentication, for information on how to set up the **Azure AD authentication method**.

To add **Azure AD** user groups to the **Portal**, proceed as follows:

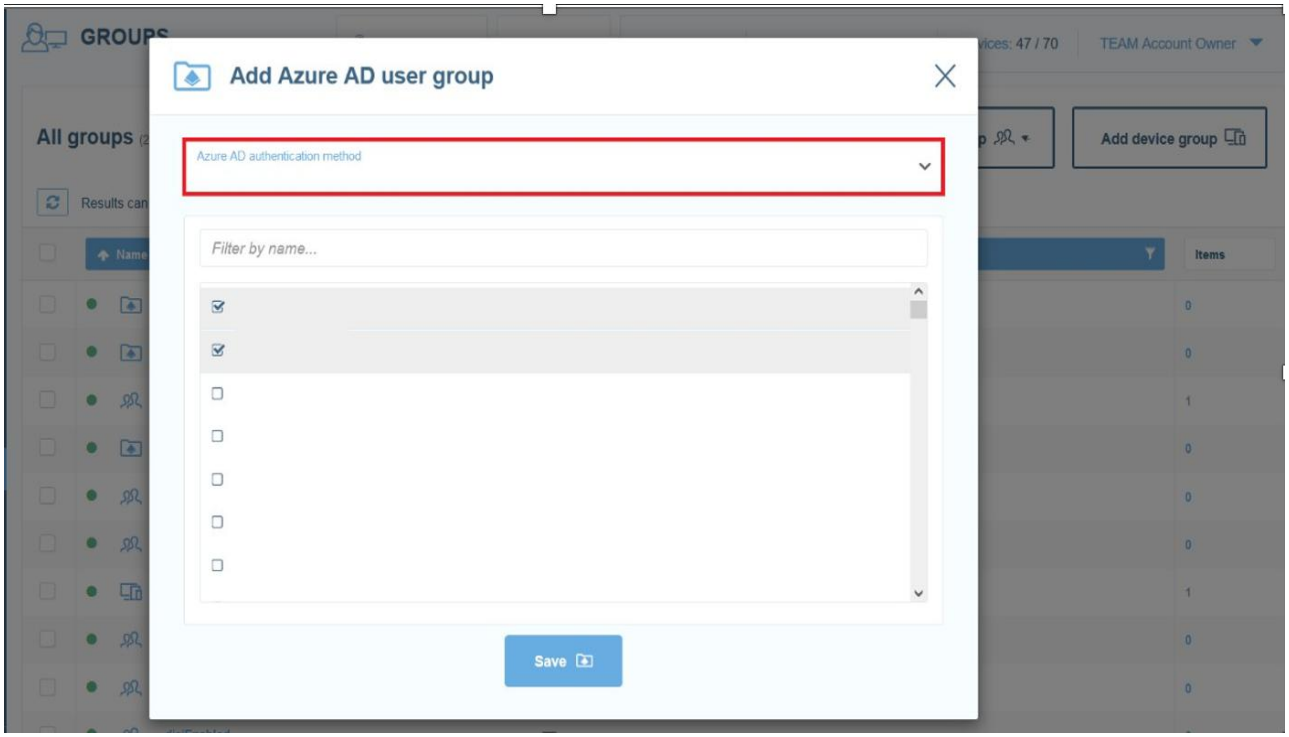
1. From the **Manage** > **Groups** tab, click on the **Add user group** button.

2. Select the **Add Azure AD user group** option from the dropdown field.

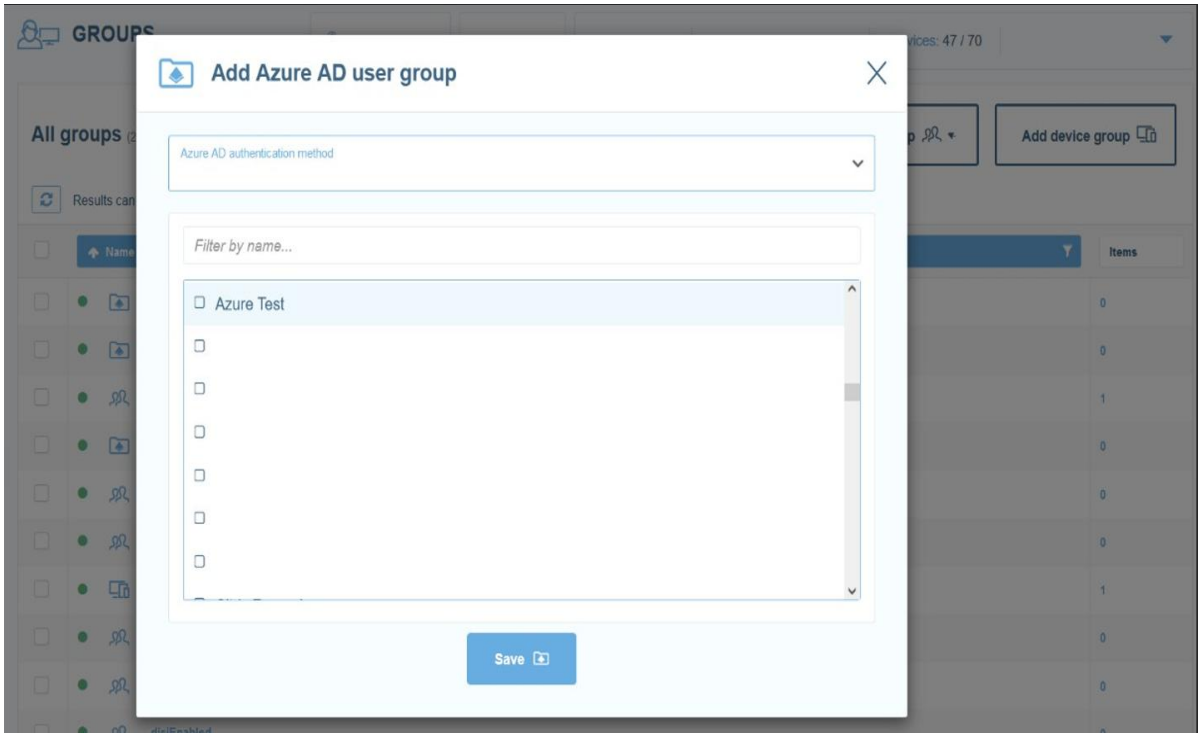
   The **Add Azure AD user group** page is displayed.



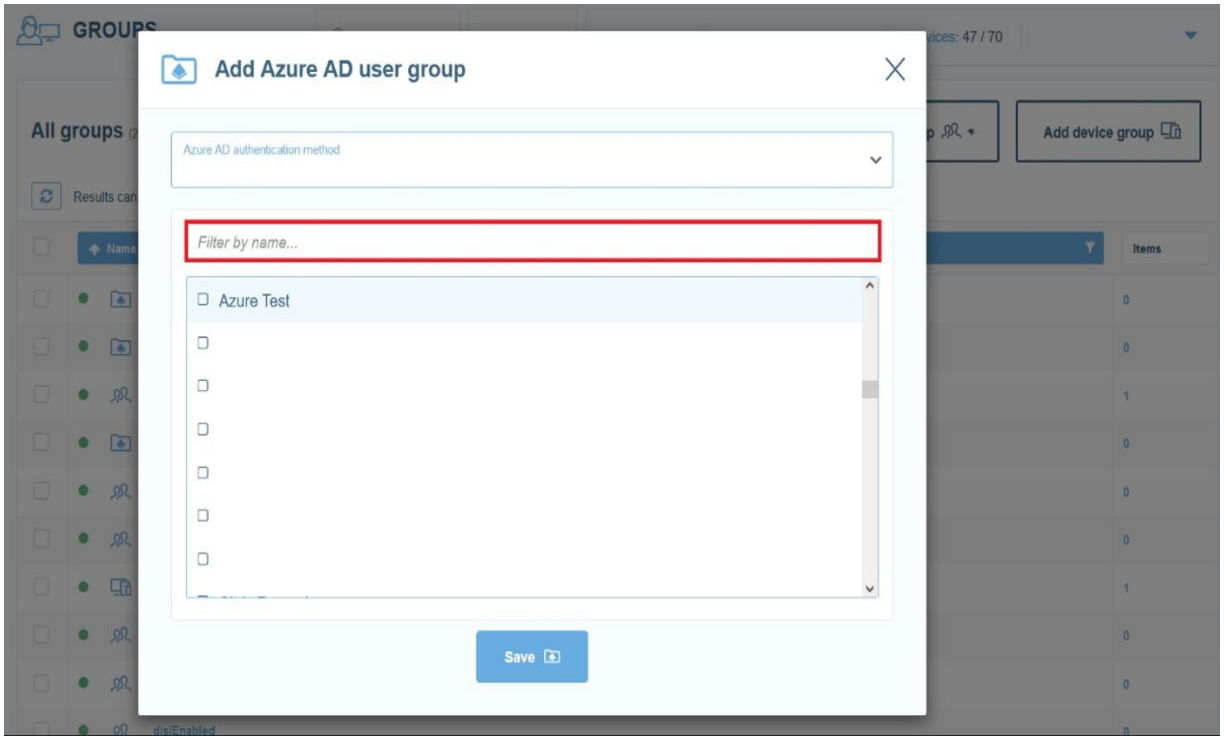
3. Select the **Azure AD authentication method** from the dropdown button.



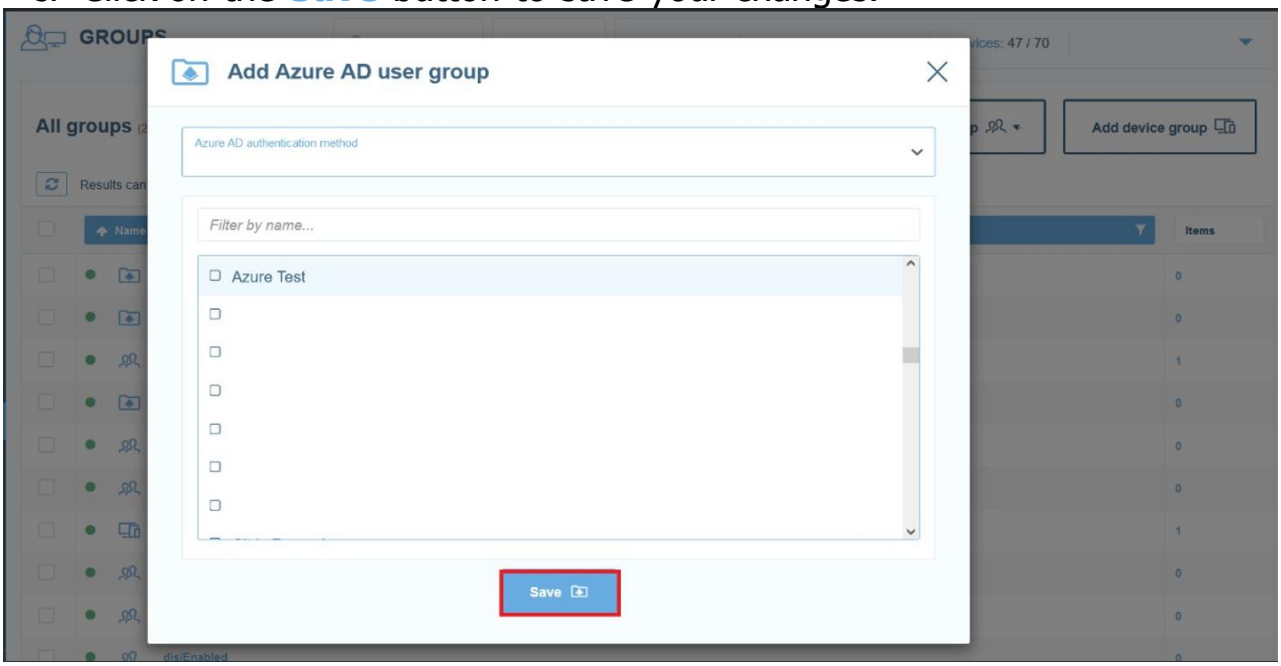
4. Select the user groups you want to add. Previously added groups are marked in gray.



Use the *„Filter by name entry"* field to quickly find the Azure AD user group that you want.



5. Click on the **Save** button to save your changes.



On every user login, the group membership is verified. If the user belongs to any of the **Azure AD** user groups that were added to the **Portal**, the group membership is also updated in the **Portal**.

4.2.4 LDAP user groups

To keep the same group membership in the **Portal** as you have in your **LDAP** directory, add (import) the corresponding **LDAP** groups.

Every time a new employee comes and needs to be added to one of the groups, or an employee leaves the company or changes groups, the user can be managed (added/removed/disabled) directly in the company's **LDAP** directory (instead of having to manage the user in both the **LDAP** and the **Portal**).

To achieve this, proceed as follows:

1. Add the **LDAP** authentication.
2. Add **LDAP** user groups.

By adding an **LDAP** user group, a special group is created in the **Portal** with the same name as in the **LDAP** directory.

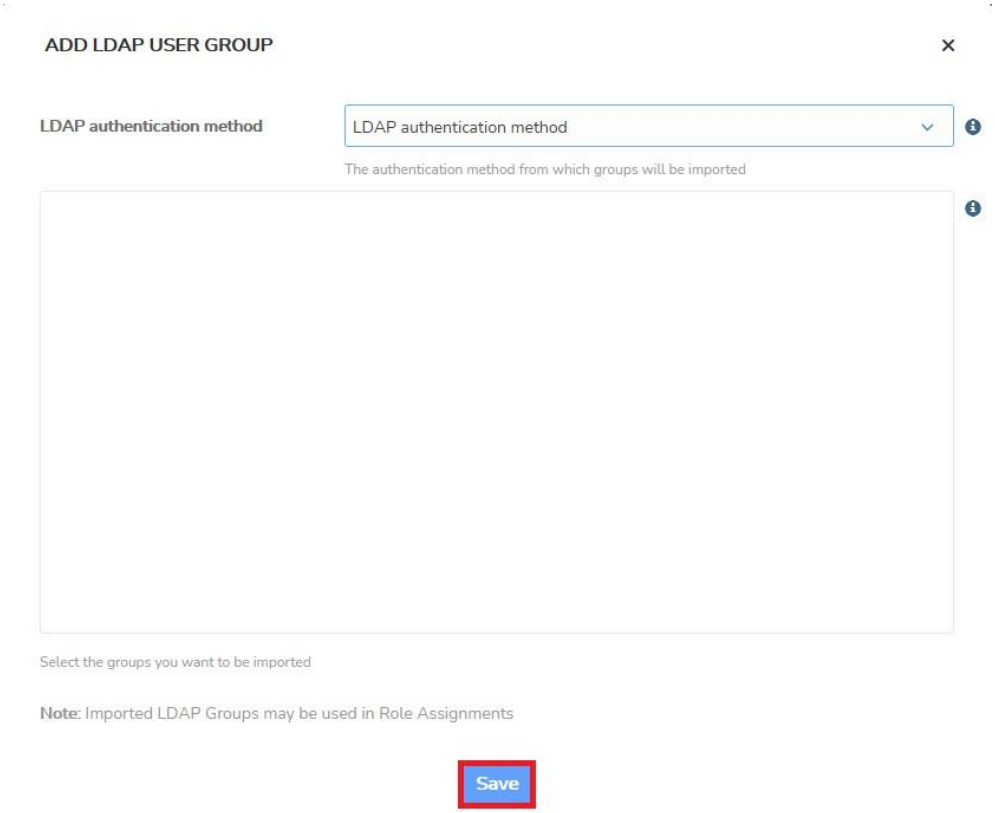
This special type of group works as follows:

- No users can be manually attached to the group
- The only way the users are associated with the group is to add them in the **LDAP** directory and on the next login of the user, that is automatically synced with the **Portal**
- The only things that can be edited/changed in the group are the status (active/inactive) and the description

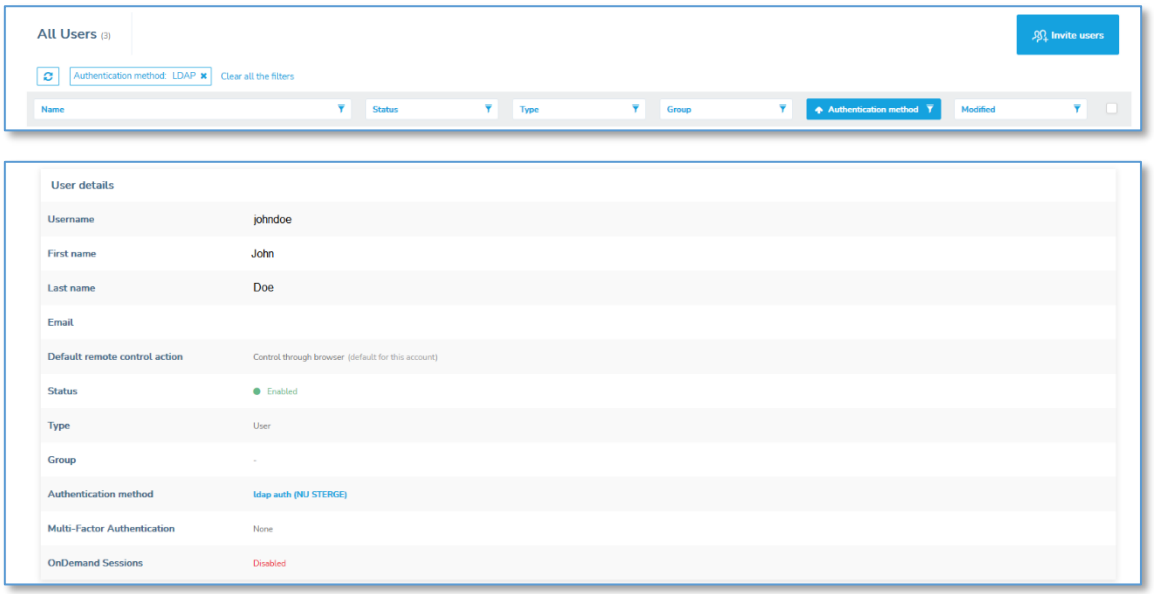
To add an **LDAP** group in the **Portal**, proceed as follows:

1. Go to **Manage** > **Groups** tab.
2. In the upper-right corner of the page click on the **Add user group** button.
3. Select the **Add LDAP user group** option from the drop-down field. The **Add LDAP user group** page is displayed.
4. From the drop-down select the **LDAP** authentication method from which groups are imported. The drop-down lists all the **LDAP** authentication methods you added from the **Account** > **Authentication** tab. For information on how to add an **LDAP** authentication method, refer to the Enable LDAP authentication sub-chapter.
5. Select the user groups to import. The groups that were imported in the **Portal** are marked in gray.
6. To import the selected group in the **Portal**, click on the **Save** button. The users are not synchronized at this stage.

NOTE: You can attach an **LDAP** user to the **Portal** groups. A user cannot be attached to an **LDAP** group.



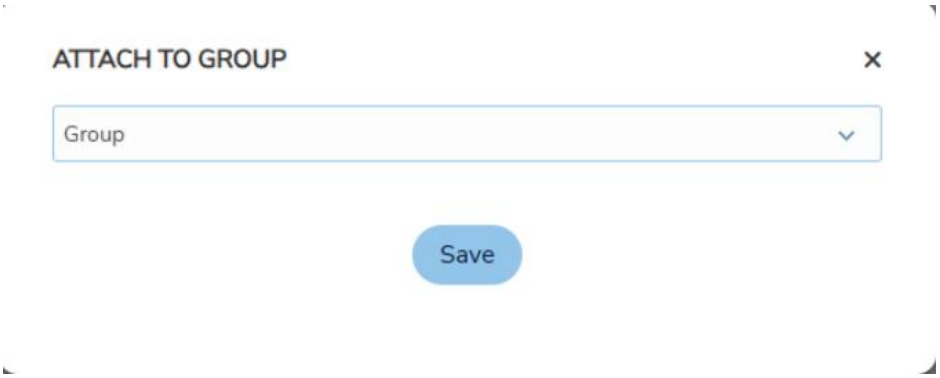
On every use login, the group membership is verified. If the user belongs to any of the **LDAP** groups added to the **Portal**, the group membership is also updated in the **Portal**. The name and email are synchronized on the user login.



4.2.5 Attach devices to device groups

To attach devices to a device group, proceed as follows:

1. Go to the **Devices** tab, select the desired device(s).
2. Above the content area, click on the **Attach to group** button. The **Attach to Group** window is displayed.
3. Select the group to which the device(s) belongs.
4. Click on the **Save** button. The selected device(s) belong now to this device group as well.



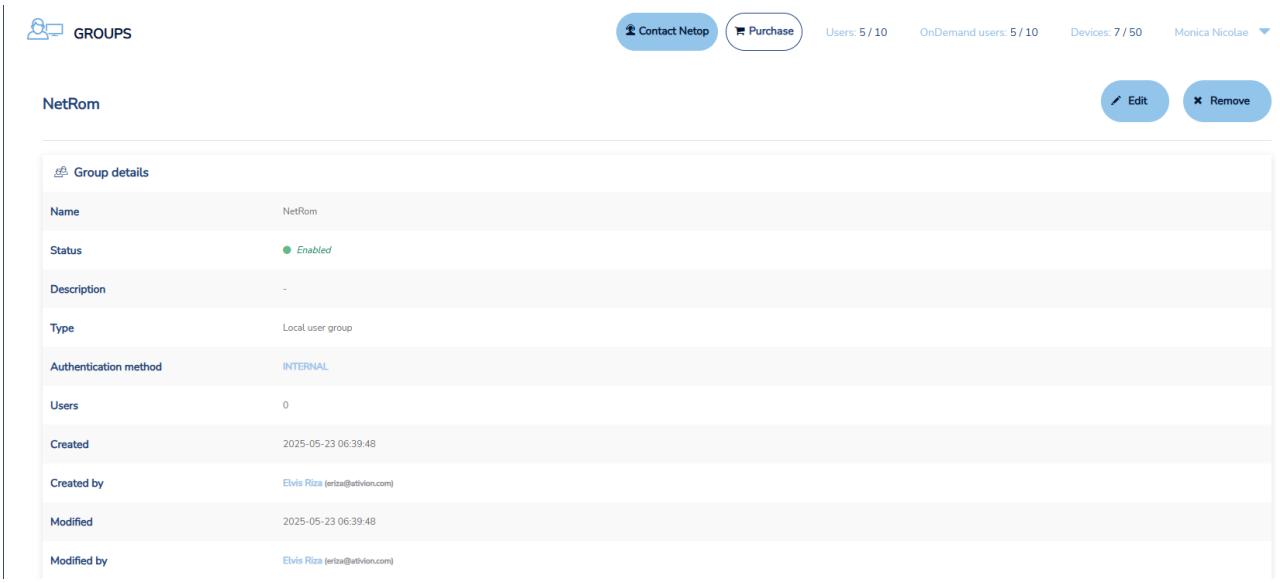
NOTE: You can attach a device to groups by editing the device and specifying the corresponding device groups.

4.2.6 View group details

To view the details of a user group, go to the **Groups** tab and click on the desired group in the **Name** column. The group details are displayed.

From the user group details page, you can:

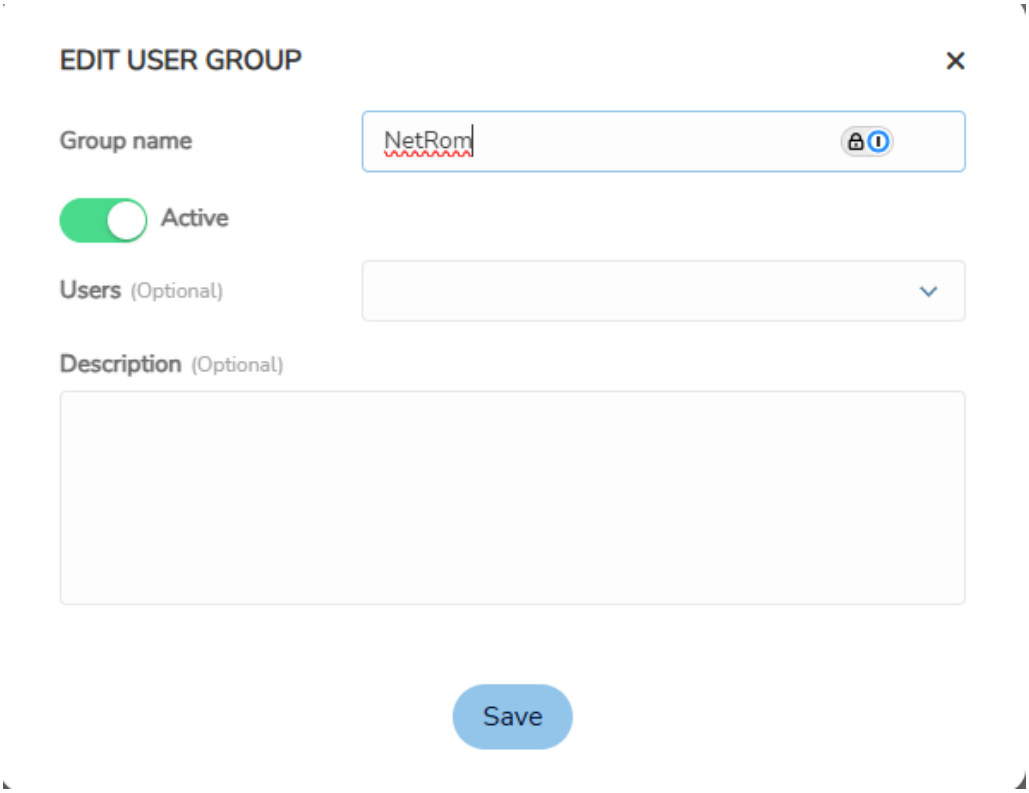
- View the users/devices who belong to the group
- **Edit group** details, such as the group name, group status and description (**LDAP** group allow editing of status and description only)
- Remove the group



4.2.7 Edit Groups

To edit group details, go to the **Manage** > **Groups** tab, and click on the specific **Group**.

Above the content area click on the **Edit** button. The **Edit Group** window is displayed.



Change the group details, such as the group name, group status or description and click on the **Save** button.

NOTE: For **LDAP** groups you can only change the description and the status. If you toggle off the **Active** button, it disables the group so that role assignments no longer apply. Disabling does **NOT** remove the group.

4.2.8 Remove groups

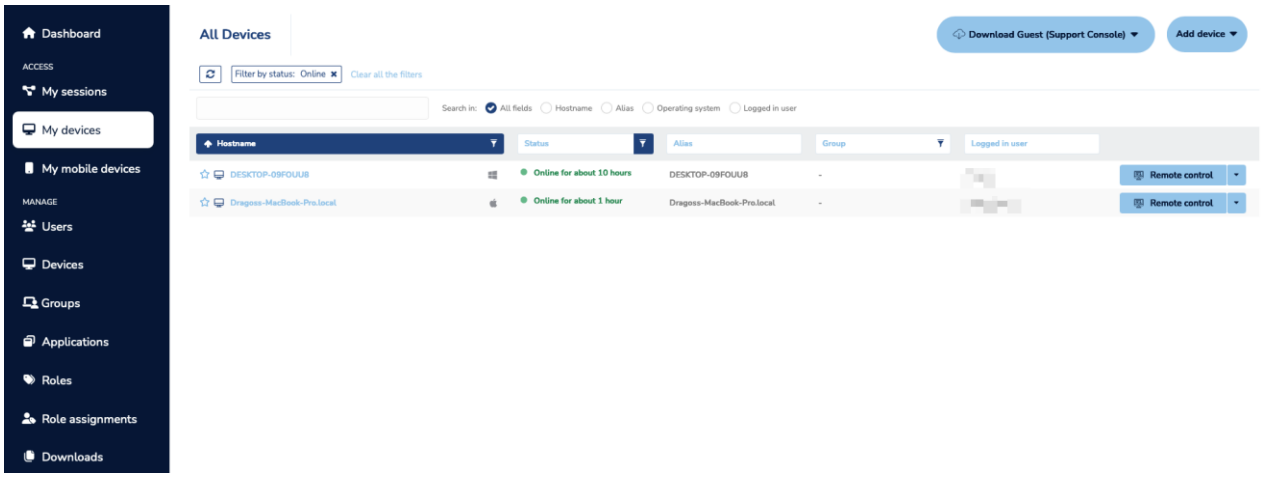
To remove a group, proceed as follows:

1. Go to the specific group in the **Manage** > **Groups** tab.
2. Above the content area, click on the **Remove** button. A confirmation window is displayed.
3. Click on **Yes**.

NOTE: By removing the group, the users/devices which are members of that specific group are not removed.

4.3 Manage Devices

Once a device is configured with the **Portal** profile and is online, it is automatically displayed in the **Portal** interface, **Devices** section and **My devices** tab.



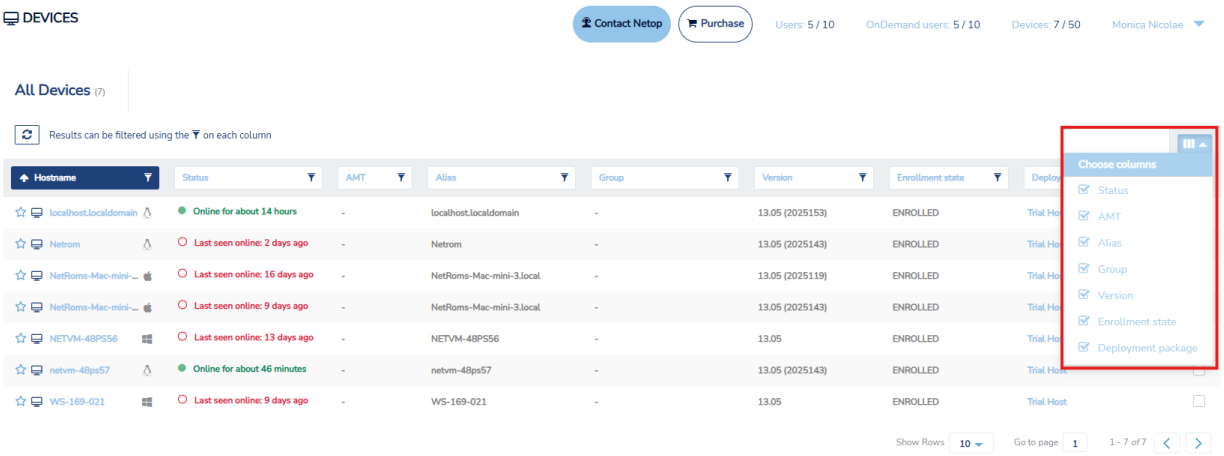
To easily manage your devices, the **My devices** tab contains information such as the hostname, the online availability of the device, device alias, group of belonging, and the user.

In the **Manage** > **Devices** tab you can select the columns you want to view.

To modify the column view, proceed as follows:

1. Go to the **Manage** > **Devices** tab.
2. From the top-right corner of the screen, click on the **Choose columns** button.

3. Select the columns you want to view or hide. The changes that you make have an immediate effect.



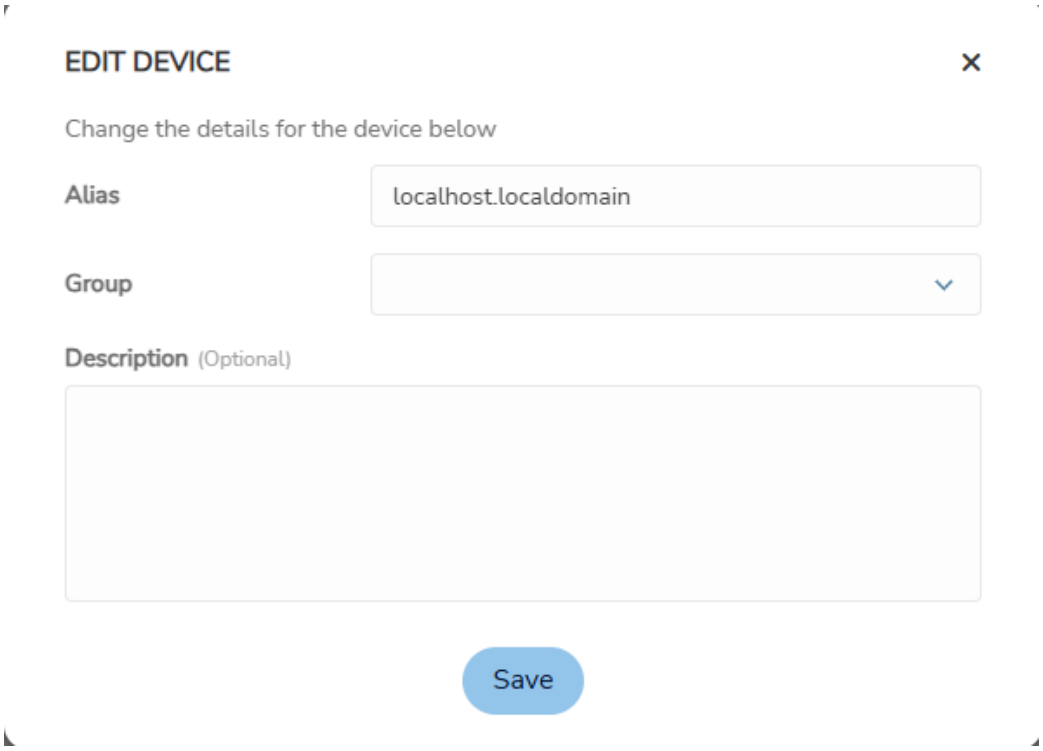
4.3.1 Edit devices

To edit a device, proceed as follows:

1. Go to the **Manage** > **Devices** tab.
2. Select the specific device.
3. Click on the **Edit** button.

You can also edit the device by selecting the device and click on the **Edit** button on the top-right menu.

Setting	Description
Alias	An internal name that could help supporters and administrators to identify faster the device.
Group	The Device group(s) that the device is attached to. A device can be attached to any number of device groups.
Description	An extended description for the device.



4.3.2 Remove devices

To remove devices, go to the **Devices** area, select the devices you want to remove and above the content area click on the **Remove** button. A confirmation dialog is displayed. To remove the selected devices from the **Portal**, click on **Yes**. This is useful for devices that are not online anymore (e.g., devices that are not used any longer or that do not have a **Host** installed). For the devices that have a **Host** installed on them and are connected to the **Portal**, they are re-enrolled on the next **Host** restart (they show up again in the device list).

Refer to the Revoke deployment packages sub-chapter for more information on how to disable devices associated with a deployment package.

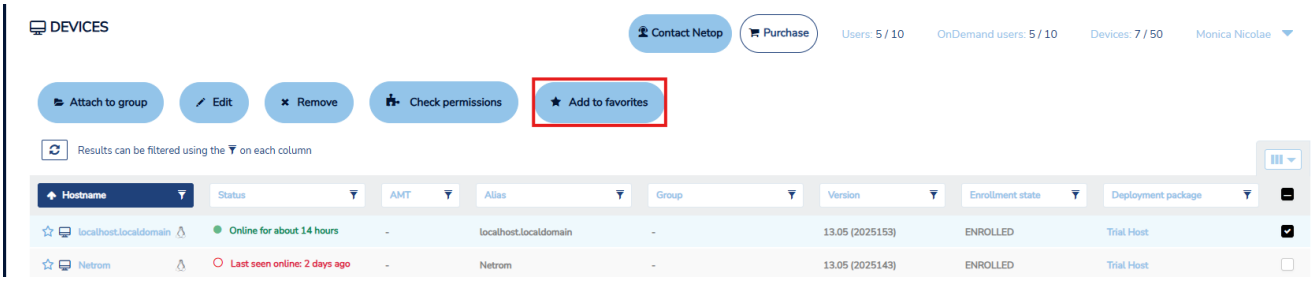
NOTE: Make sure that you have an Account Administrator user type or higher to remove a device.

4.3.3 Favorite Devices

With the **Portal**, you can add devices to favorites. Favorite devices are displayed first in the list in the **Devices** tab.

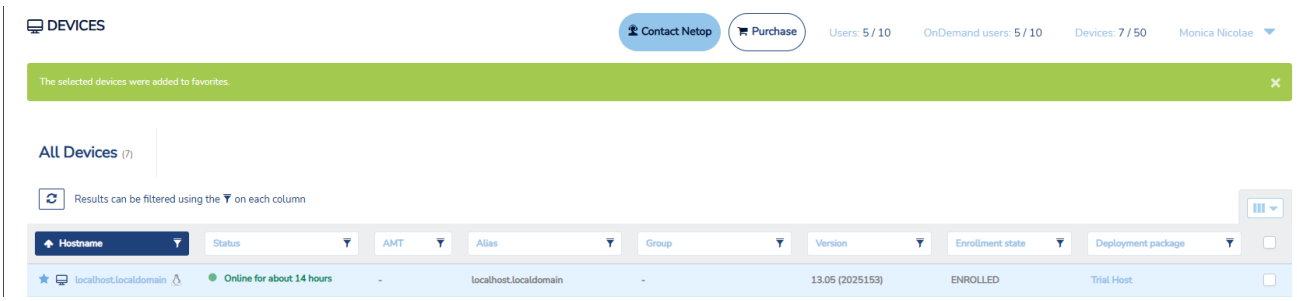
NOTE: This feature is only available when using the new **Connection Manager**. The **Connection Manager** serves as a meeting hub for **Guests** and **Hosts** and is responsible for managing the connections between modules.

To add a device to favorite, proceed as follows:

1. Go to the **Devices** tab.
2. Select the device you want to add to favorite.
3. Click on the "**Add to favorites**" button, which is found in the top-right of the screen.
4. 

Alternatively, through the **Portal** you can add a device or multiple devices to favorite as follows:

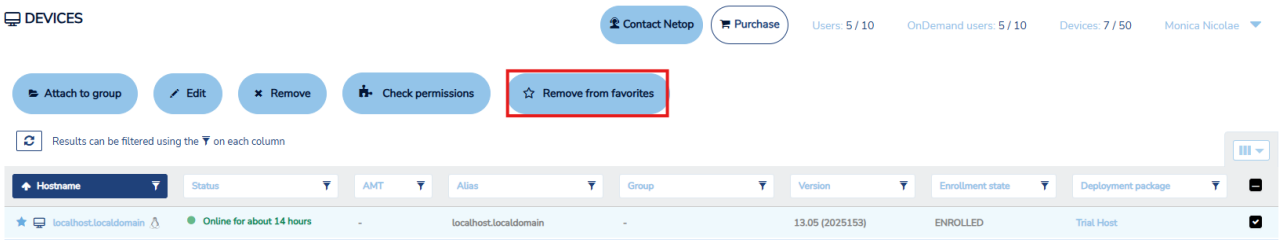
- Click on the blue star near the device **Hostname** in the **Devices** tab; favorite devices display a filled blue star near the device **Hostname**
- Select the device or multiple devices with the check button in the **Devices** tab and click on the "**Add to favorites**" button



To remove a device from favorite, proceed as follows:

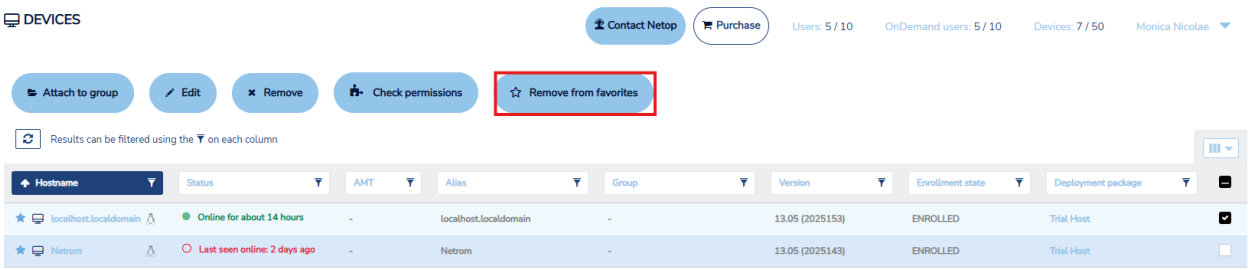
1. Go to the **Devices** tab.

2. Select the device you want to remove from favorite.
3. Click on the **Remove from favorites** button, which is found in the top-right of the screen.



Alternatively, through the **Portal** you can remove a device or multiple devices from favorite as follows:

- Click on the blue star near the device **Hostname** in the **Devices** tab; removed devices display an empty blue star near the device **Hostname**
- Select the device or multiple devices with the check button in the **Devices** tab and click on the **Remove from favorites** button



4.3.4 My Mobile Devices

To add mobile devices to the **Portal**, open the email received from **Netop** with your **myCloud** account information. Activate your account by using the link received in the email and set up a password.

In the Chrome Internet browser, add the **WiseMo Guest for myCloud** extension from the Chrome Web Store link.

To add a **Host** on your mobile device, proceed as follows:

1. Download the **WiseMo Host** App from the App/Play Store on your mobile device. Depending on the manufacturer of your mobile device, it might be necessary for you to install an extra add-on to allow remote desktop features on your mobile device.
2. Open the **WiseMo Host** app.
3. Grant permissions when asked by the **WiseMo Host** app.
4. Specify your **myCloud** credentials.
5. Restart the **Host**.

To access your mobile device(s) from the **Portal**, proceed as follows:

1. Log in the **Portal**.
2. Access the **My mobile devices** tab.
3. There are two ways that you can control your mobile device. Click on the **Remote control** dropdown button and you can select between:

- Control through Chrome app (default action)
- Control through WiseMo Guest

If you directly click on the **Remote control** button, the **Portal** starts the remote control session via the Chrome app, which is the default action.

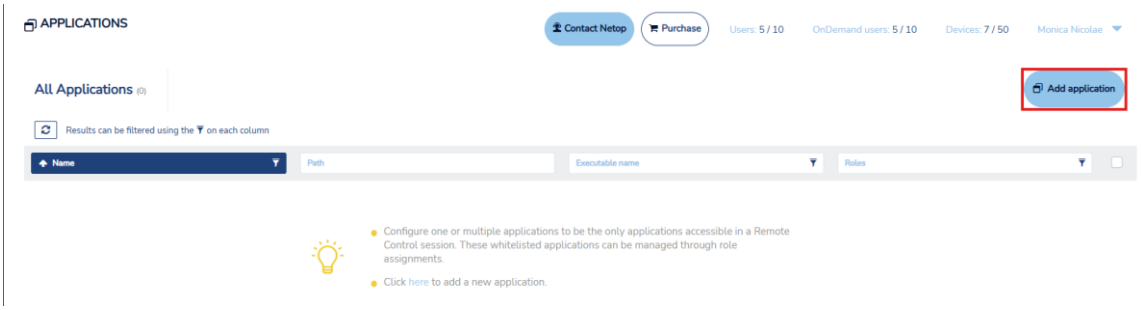
NOTE: Refer to the supported versions article in the **Knowledge Base** for more information about the supported mobile devices in the **Portal**.

4.3.5 Applications

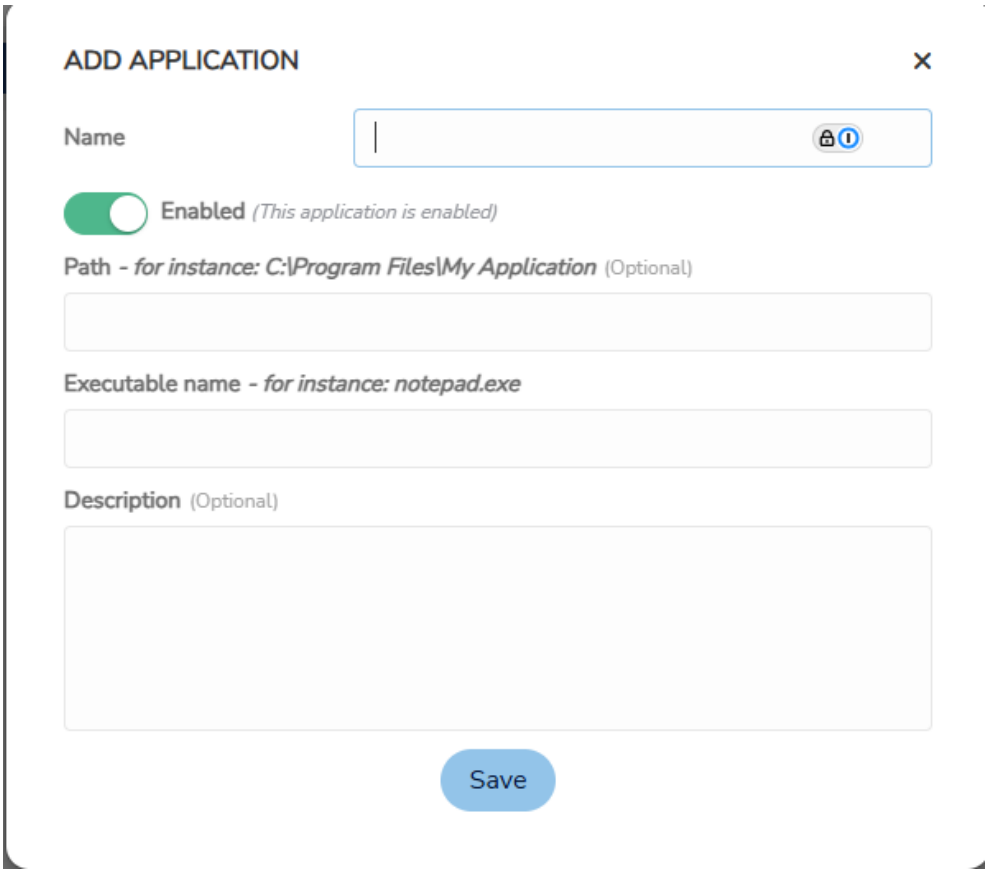
With whitelisted applications, account administrators can restrict remote control sessions to a single application (or list of applications) on the **Host** device. This includes viewing the screen and using a keyboard and mouse for those applications.

To add an application, proceed as follows:

1. Click on the **Add application** button.



2. Fill in the required information.
3. Click on **Save**.



Setting	Description
Name	A name for the application
Path	The path for the application, including system environment variables (e.g., `%windir%\system32`)
Executable name	Executable name (e.g., `notepad.exe`)

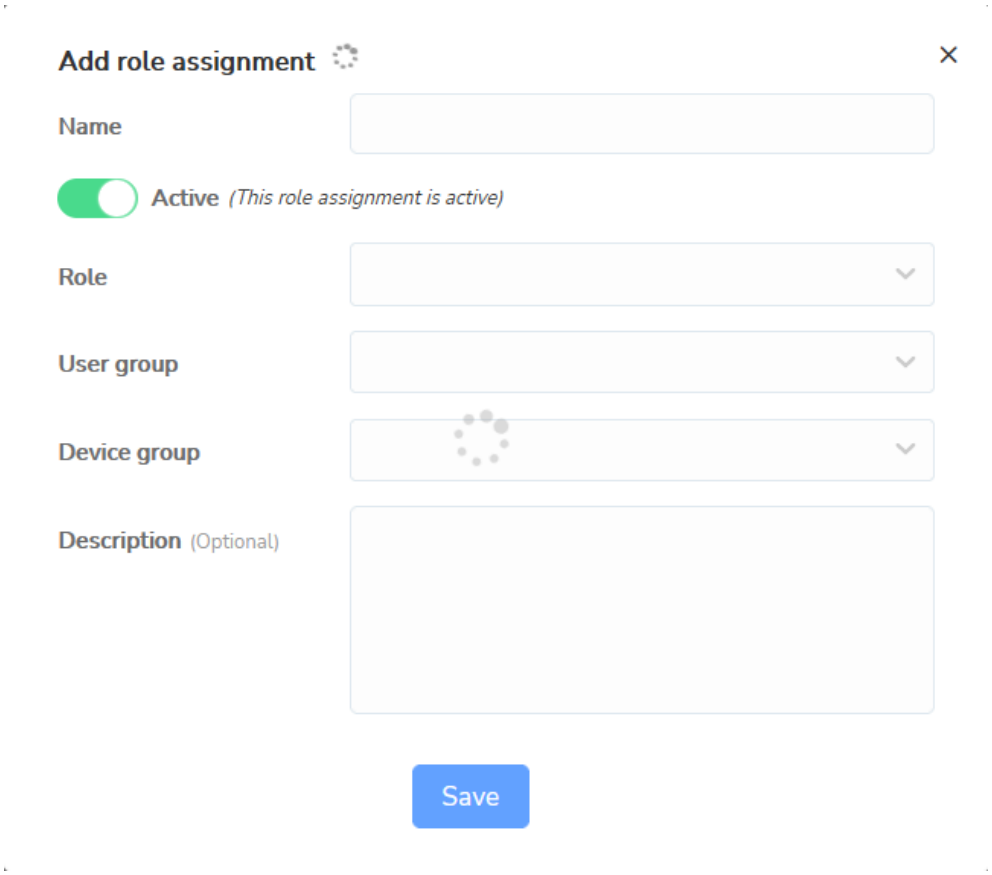
Setting	Description
Description	Description of the application

NOTE: The role assignment automatically becomes disabled if the applications set as part of whitelisted applications are disabled.

4.4 Roles and Role assignments

Roles are a set of permissions that can be applied to a group of users through **Role Assignments**.

A role assignment is comprised of a role, a group of users, and a group of devices. Create user groups (including **LDAP** and **Azure AD** user groups) and device groups before adding new role assignments.



These are used for defining the permissions for the users in the **Portal** and remote accessing a device.

NOTE: The devices listed in the **Portal** under the **My devices** tab are only the devices that the user is allowed to connect to (at least one Role assignment needs to exist containing a User group with that User and a

Device group with that Device). For a user to be allowed to create (and use) **OnDemand Sessions** under the **My sessions** tab, create the role assignments for that group with an **OnDemand** - role type.

4.4.1 View Predefined Roles

The page provides a listing of the available roles, their type, name, and a short description.

Multiple role types have been implemented, each representing a specific set of permissions:

- The **Device** role type includes a set of permissions related to remote control sessions. By clicking on the name of a specific role from the roles page, the user is provided information about the role and the full list of associated permissions.

  NOTE: When creating a **Device** role type, make sure to select the corresponding client type for your **Guest** device.

- The **OnDemand** role type includes a set of permissions related to the **OnDemand Sessions**. The permissions include keyboard and mouse access and to view the remote screen.
- The **Confirm access** role type provides increased security through the addition of a confirmation dialog on the **Host** side.
- The **Whitelisted applications** role type provides the capability to restrict remote control sessions to a single application.

NOTE: **Account Administrators**, **Owners** and **Group Managers** can view the **Roles.**

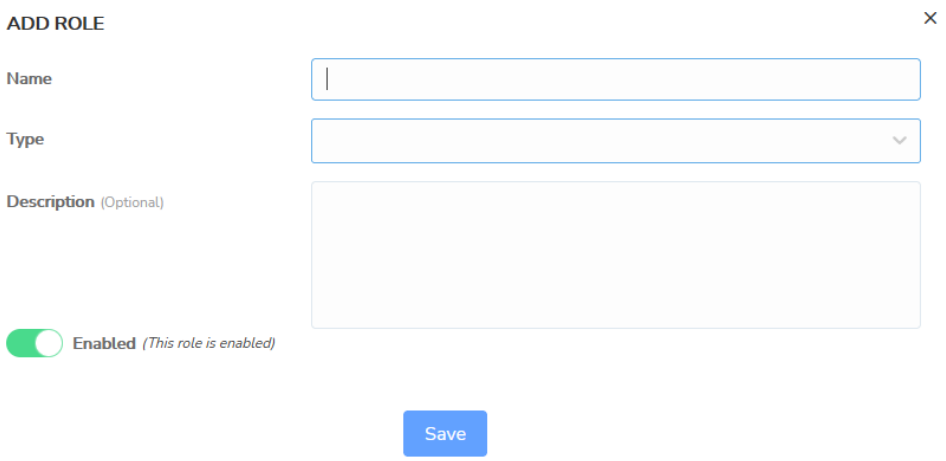
Predefined Roles	Description
Administrator	Provides full access to the remote device when using the **Control through browser** option or an installed **Guest**.
Web Support	Provides full access to the **Control through browser** option. Access from an installed **Guest** is not allowed.
Full Access	Provides full access to the remote device when using

Predefined Roles	Description
(OnDemand Sessions)	the **OnDemand** Session. This role does not apply to regular **Guests** and **Hosts**.
Confirm Access Required	Requires that the local user at a remote device to confirm a session before it starts; except for when the computer is locked, or no one is logged in.

4.4.2 How to add a role

To add a role, proceed as follows:

1. Go to the **Roles** tab.
2. Click on the **Add** button.
3. Specify a name for the role.
4. Select the role type from the drop-down list.
5. Enable or disable the role.
6. To save the changes made, click on the **Save** button.



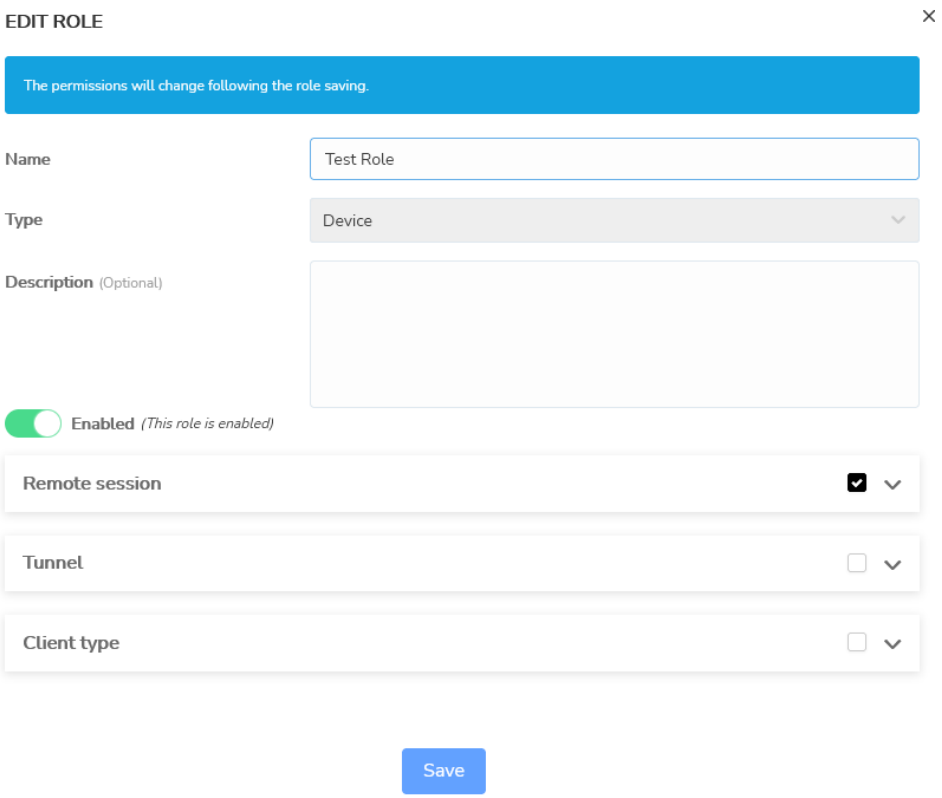
4.4.3 How to edit a role

To edit a role, proceed as follows:

1. Go to the **Roles** tab.
2. Select a role to edit.
3. To edit the role, click on the **Edit** button.
4. In the **Edit role** dialog box, you can:

- Edit the **Role** Name.
- Edit the **Type** from the drop-down list.
- Edit the description.
- Enable or disable the role.
- Edit additional **Role type** options

5. To save the changes made, click on the **Save** button.

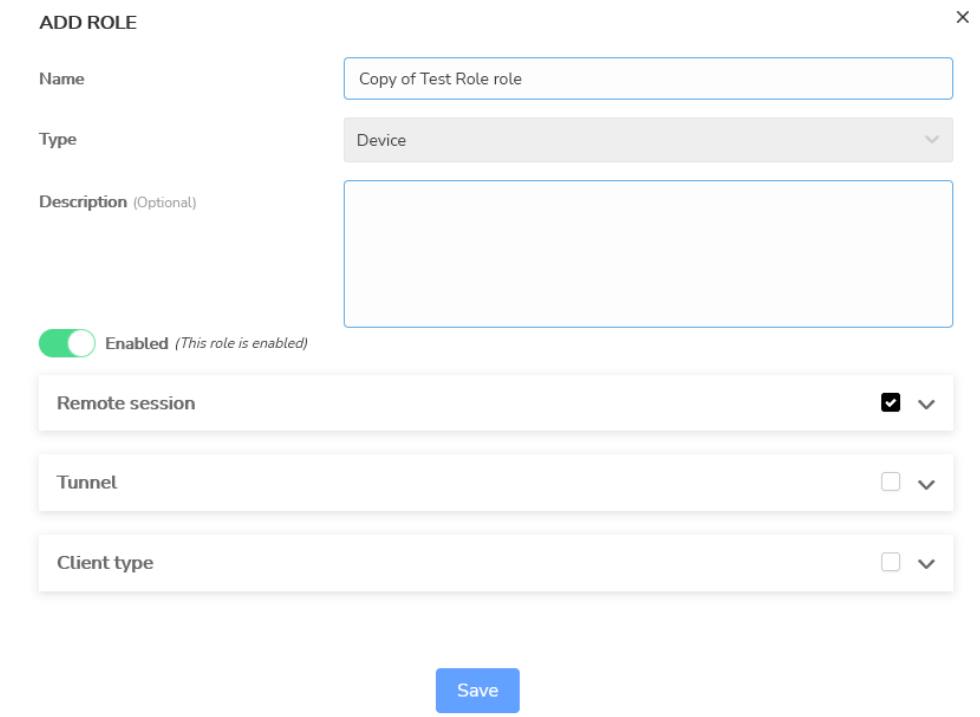


4.4.4 How to copy a role

To copy a role, proceed as follows:

1. Go to the **Roles** tab.
2. Select a role to copy.
3. Click on the **Copy role** button. The **Add role** dialog box is displayed.
4. Edit the name of the role you want to copy.
5. Edit the description of the role you want to copy.
6. Enable or disable the role.
7. Edit additional **Role type** options.

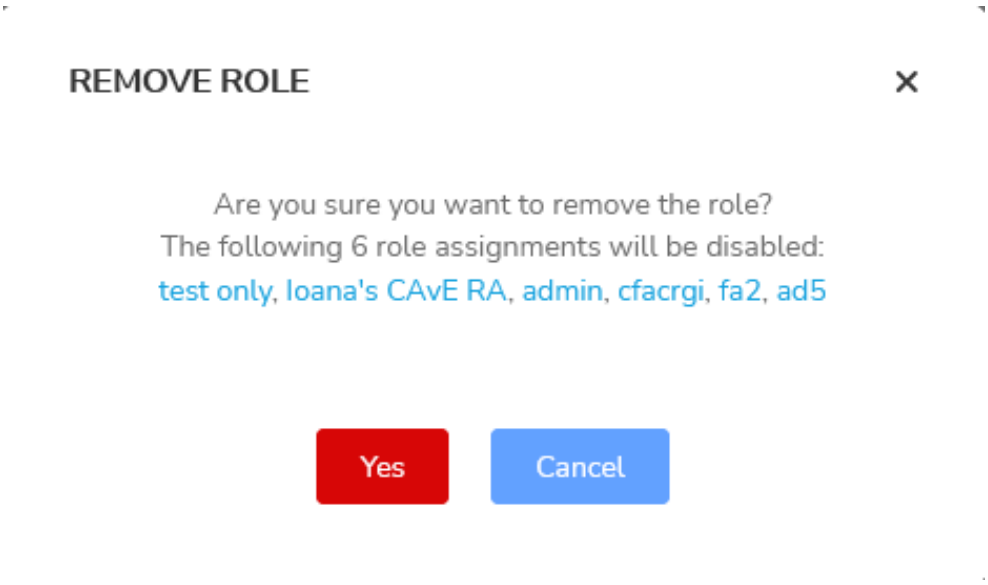
8. To save the changes made, click on the **Save** button.



4.4.5 How to remove a role

To remove a role, proceed as follows:

1. Go to the **Roles** tab.
2. Select the role you want to remove.
3. Click on the **Remove** button. The **Remove Role** dialog box for confirmation is displayed.
4. To remove the role, click on **Yes**.

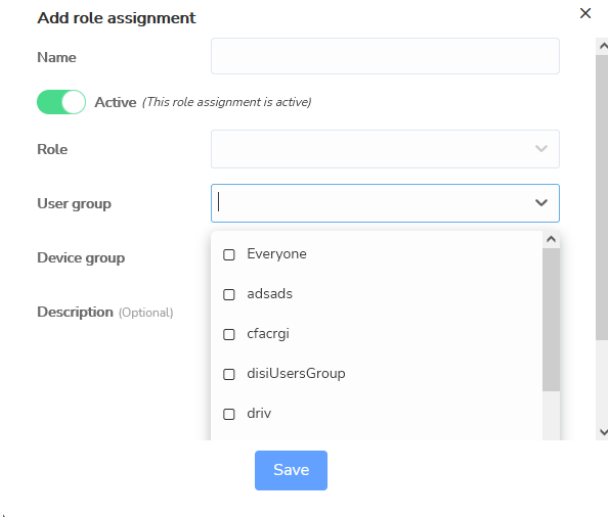


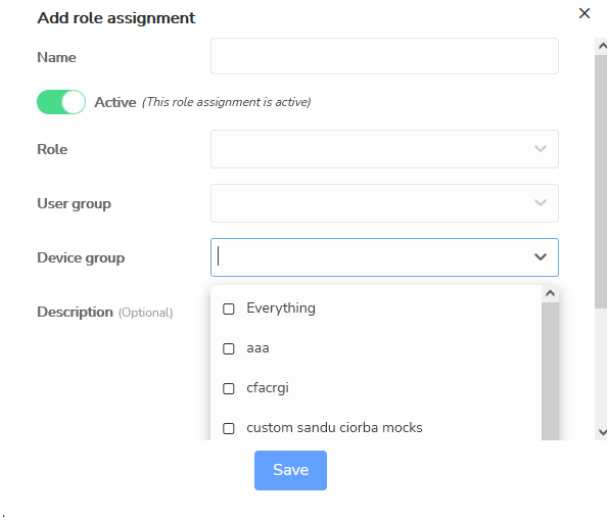
NOTE: If the user deletes a role which is part of an active role assignment, the role assignment becomes disabled and the user receives a warning about this.

4.4.6 Add role assignment

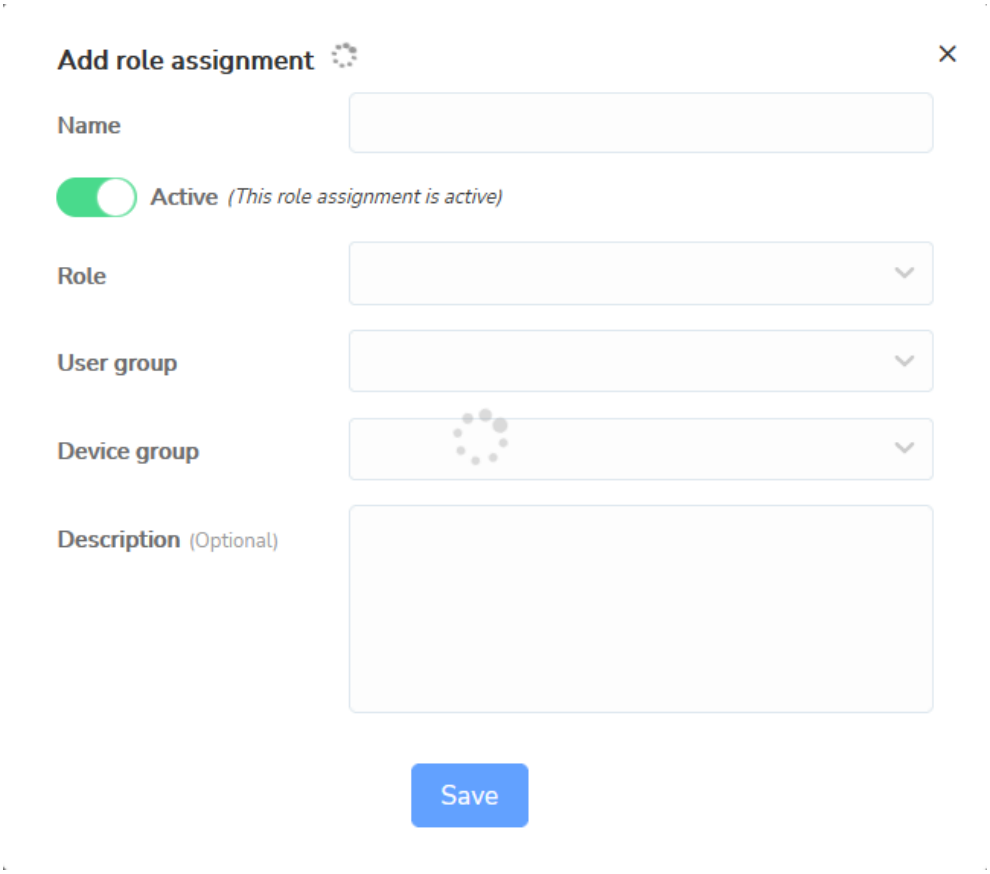
To add a role assignment, proceed as follows:

1. Go to the **Role assignments** tab and click on the **Add role assignment** button.
2. Provide the role name and make sure that the assignment is enabled.
3. From the appropriate drop-down lists, select the role, user group, and device group. Role assignments can be applied to multiple user and device groups.





4. To save your changes, click on the **Save** button.



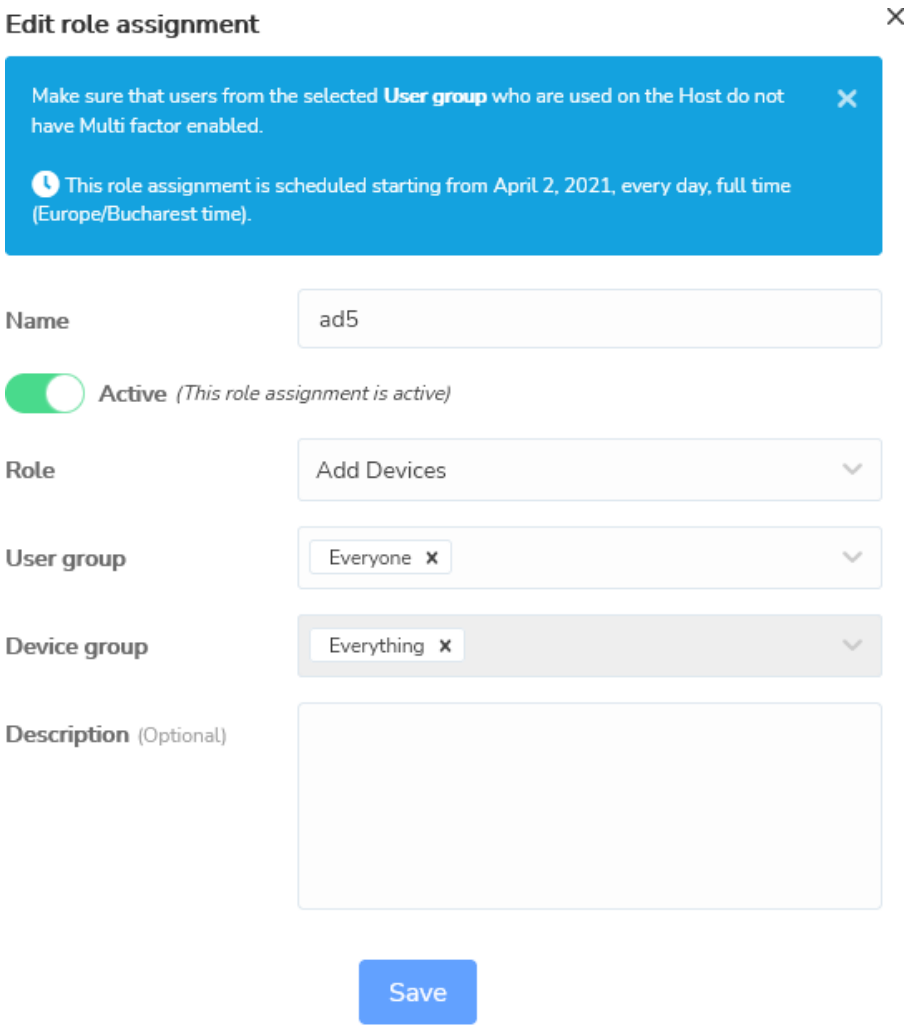
NOTE: For a role assignment to govern the permissions of a remote user, make sure that the **Host's Guest Access Security** settings are configured to use **Portal** access rights. Refer to the Netop User's Guide for more information on the **Guest Access Security** settings within the **Host**. For the **OnDemand** – type roles, device groups cannot be selected, as these role assignments do not apply to regular devices.

4.4.7 Edit role assignment

To edit a role assignment, proceed as follows:

1. Go to the **Role assignments** section, select the role assignment you want to edit.
2. Above the content area click on the **Edit** button. The **Edit Role Assignment** window is displayed.
3. Make the desired changes.

4. To save your changes, click on the **Save** button.

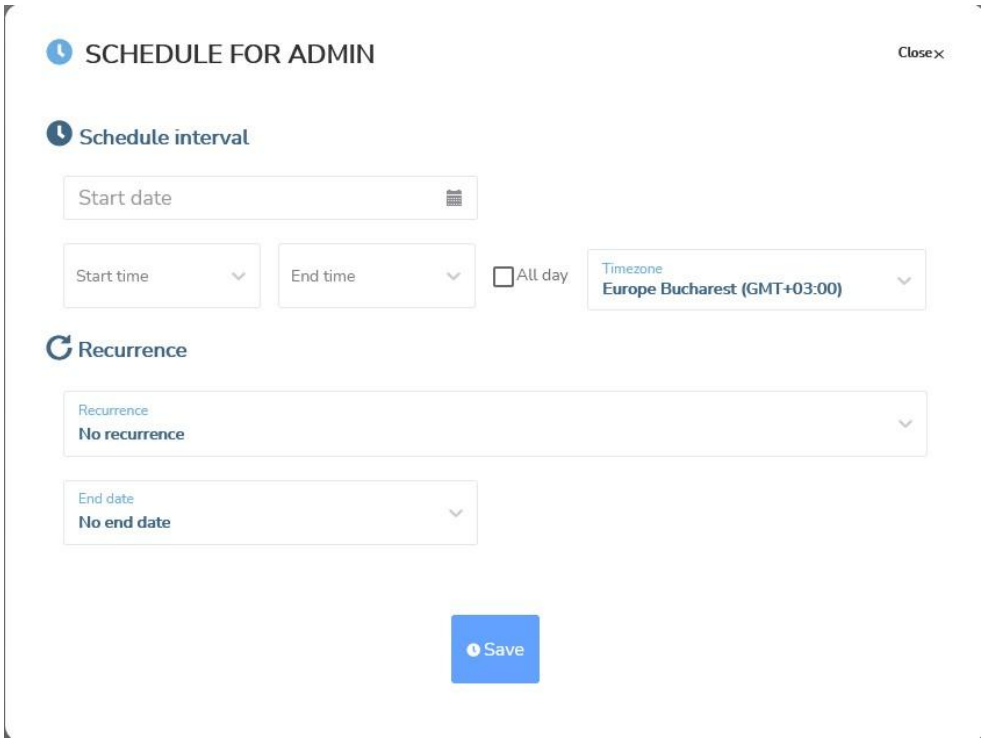


NOTE: Disabling the role assignment does not remove it from the **Portal**.

4.4.8 Create a schedule for a role assignment

A schedule can be created for a role assignment. In the scheduler you can specify the following information:

- Schedule interval
- Recurrence



NOTE: This feature is only available when using the new **Connection Manager**. The **Connection Manager** serves as a meeting hub for **Guests** and **Hosts** and is responsible for managing the connections between modules.

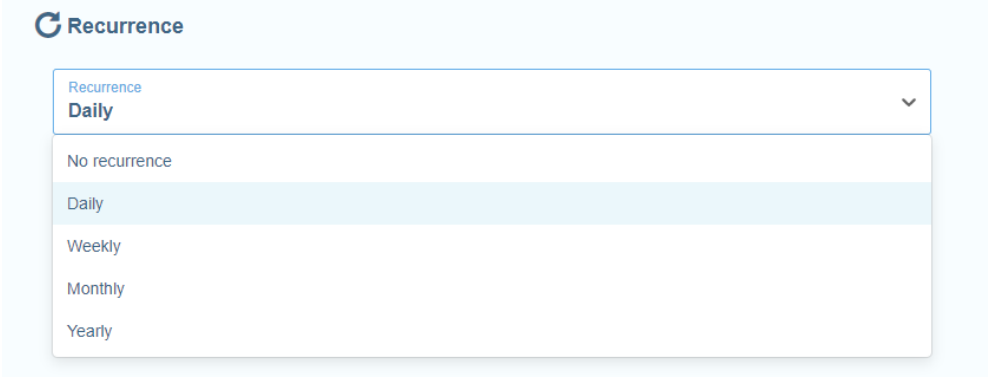
In the **Schedule interval** you can specify the following information:

- **Start date** – you specify the day that the role assignment starts
- **Start time** – you specify the time when the role assignment starts
- **End time** – you specify the time when the role assignment becomes inactive
- **All day** – you use this option to specify that the role assignment is valid throughout the day; when you use this option, the **Start date** and the **Start time** fields become inactive
- **Timezone** – you specify the **Timezone** for the role assignment

In the **Recurrence** area, you specify the recurrence for the role assignment.

The following options are available:

- no recurrence
- daily
- weekly
- monthly
- yearly



Recurrence	Description
No recurrence	Select this option to apply the schedule indefinitely.
Daily	You use this when you want the schedule to recur on specific days or every X number of days. Possible values: • Only weekdays • Only weekends • Custom
Weekly	Possible values: • Every X week on • Monday • Tuesday • Wednesday • Thursday

	• Friday • Saturday • Sunday
Monthly	Possible values: • Every X month on • Day of the month • Last day of the month
Yearly	Possible values: • Every X year on • Month of the year • Day of the month

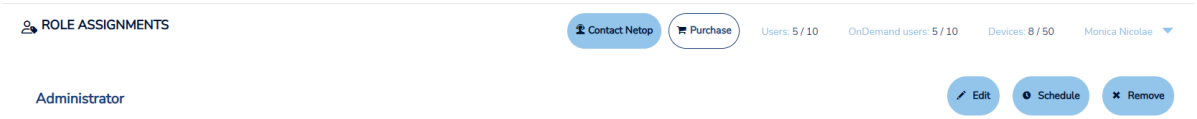
The **Schedule** status can be:

- Active

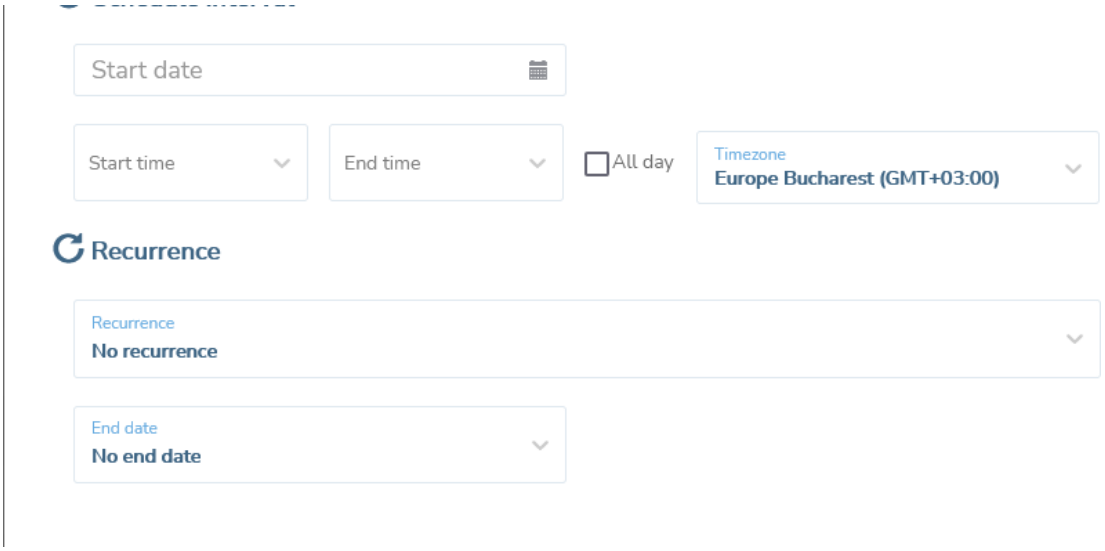
- Inactive

To create a schedule for a role assignment, proceed as follows:

1. In the **Portal** page, click on the **Role assignments** tab.
2. In the **Role assignments** tab, click on the **Role assignment** you want to assign a schedule to.
3. To add a schedule to the **Role assignment**, click on the **Schedule** button.



The **Schedule** window for the **Role assignment** is displayed.



4. Specify the schedule interval:

   4.1. Specify the Start date.

   4.2. Specify the Start time.

   4.3. Specify the End time.

   NOTE: If you click on the **Save** button and you do not specify a Start date, Start time, and End time, the Schedule applies starting on the present day, for All day, full time.

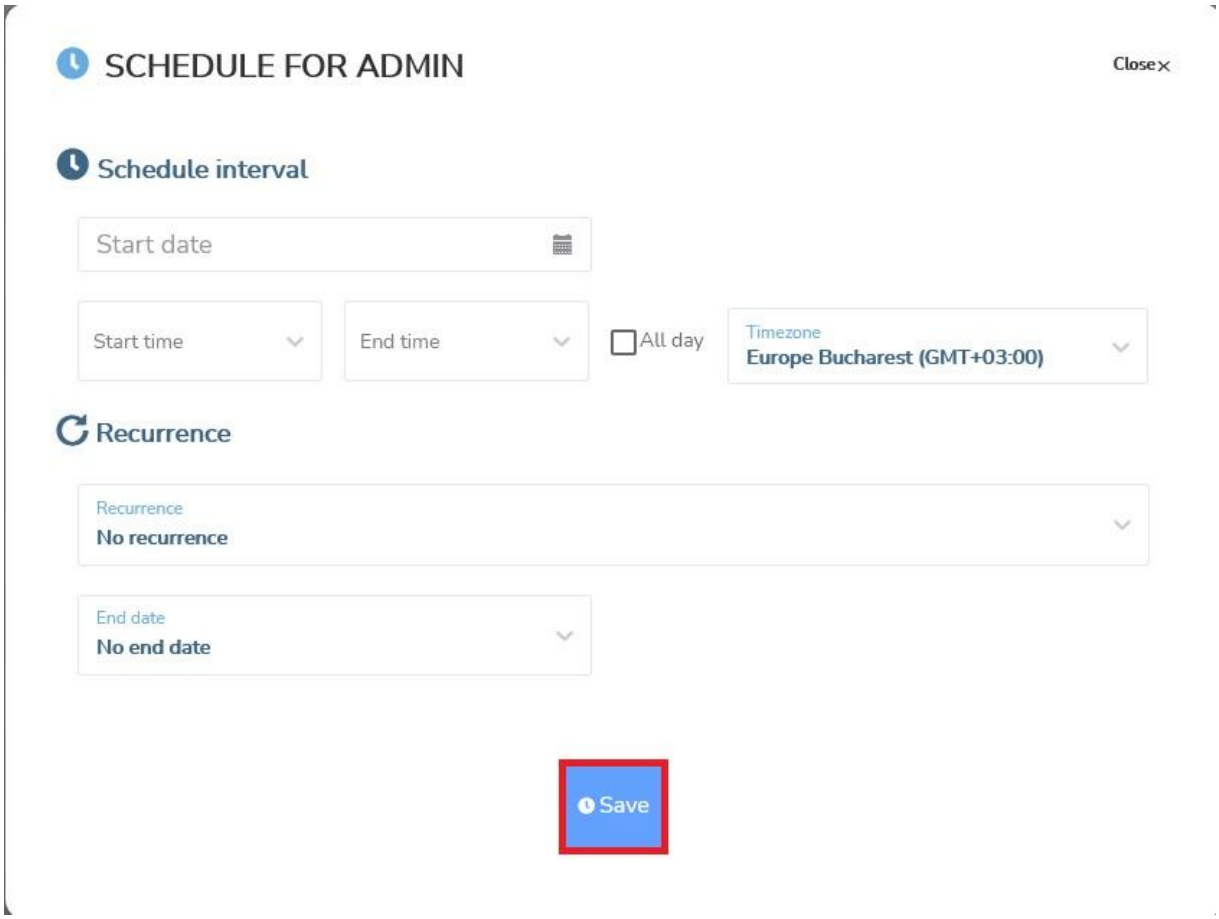
5. Specify the recurrence for the schedule:

   5.1. Specify the recurrence.

   5.2. Specify the End date for the recurrence.

   NOTE: If you do not specify a recurrence for the schedule, the schedule applies until you manually remove it, or you add an end date to the recurrence.

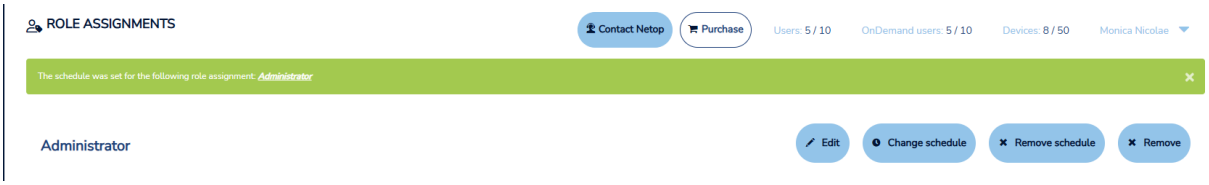
6. To save your changes, click on the **Save** button.



NOTE: You can assign a schedule to multiple role assignments.

To edit a schedule for a role assignment, proceed as follows:

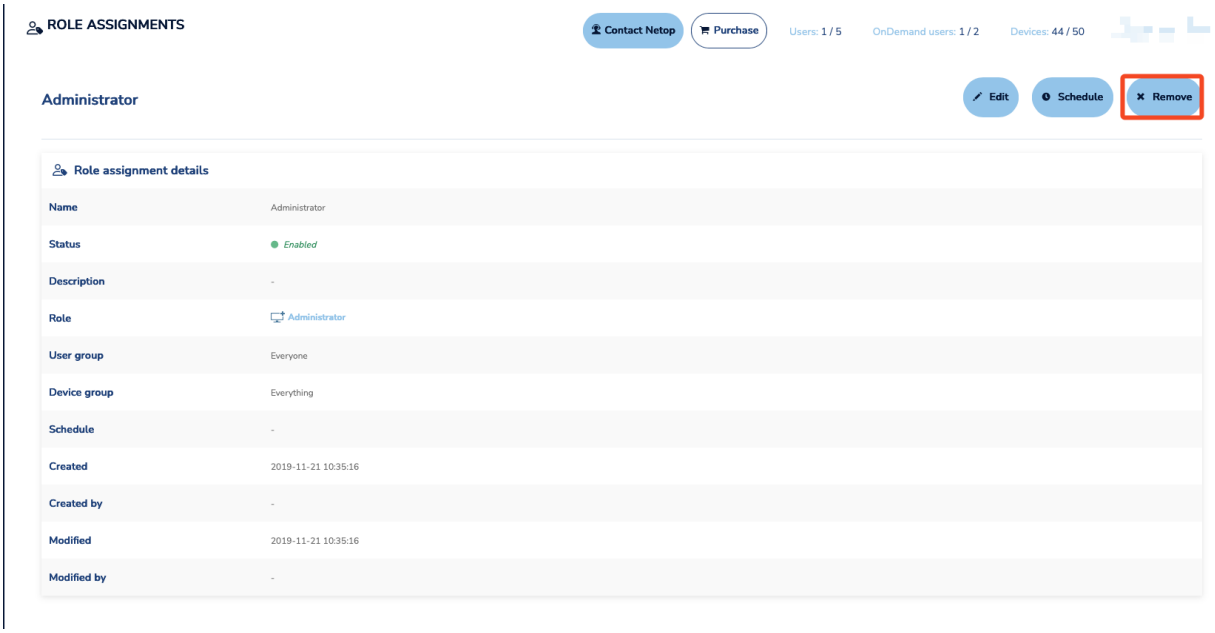
1. In the **Portal** page, click on the **Role assignments** tab.
2. In the **Role assignments** tab, click on the Role assignment you want to assign a schedule to.
3. To edit a schedule of the Role assignment, click on the **Change Schedule** button.



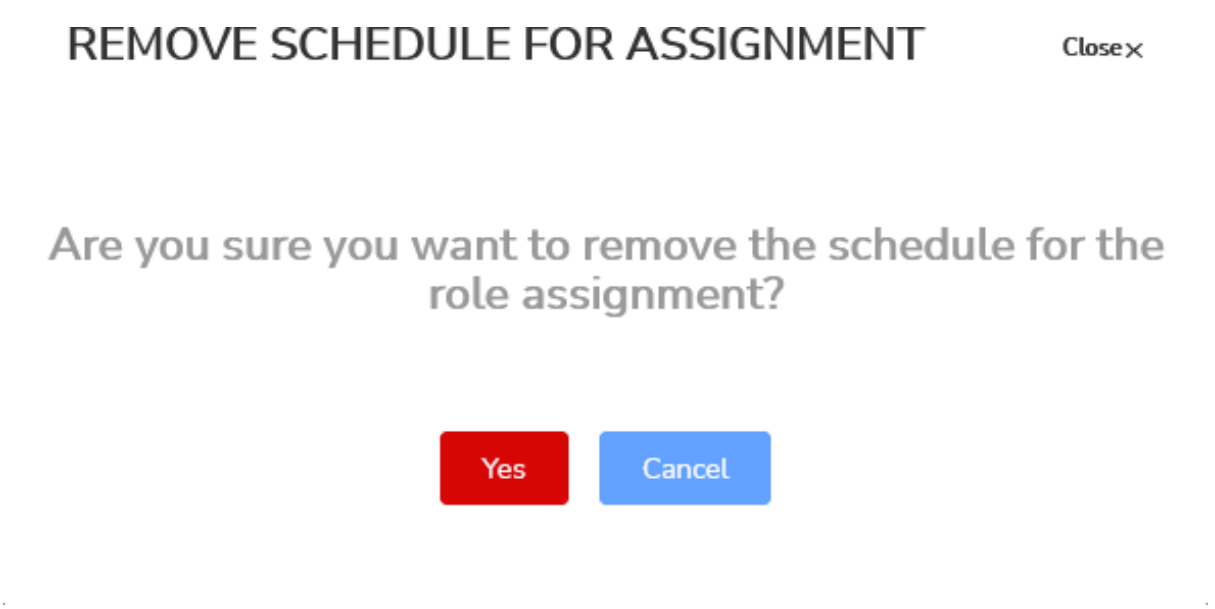
4. Make the changes you want.
5. To save your changes, click on the **Save** button.

To remove a schedule from a role assignment, proceed as follows:

1. In the **Portal** page, click on the **Role assignments** tab.
2. In the **Role assignments** tab, click on the **Role assignment** you want to remove the schedule.
3. To remove the schedule of the Role assignment, click on the **Remove Schedule** button.



The **Remove Schedule for Assignment** warning is displayed.



4. Click on **Yes** to confirm.

NOTE:

- You can remove a schedule from multiple role assignments.
- A schedule is removed if you delete the role assignment(s).

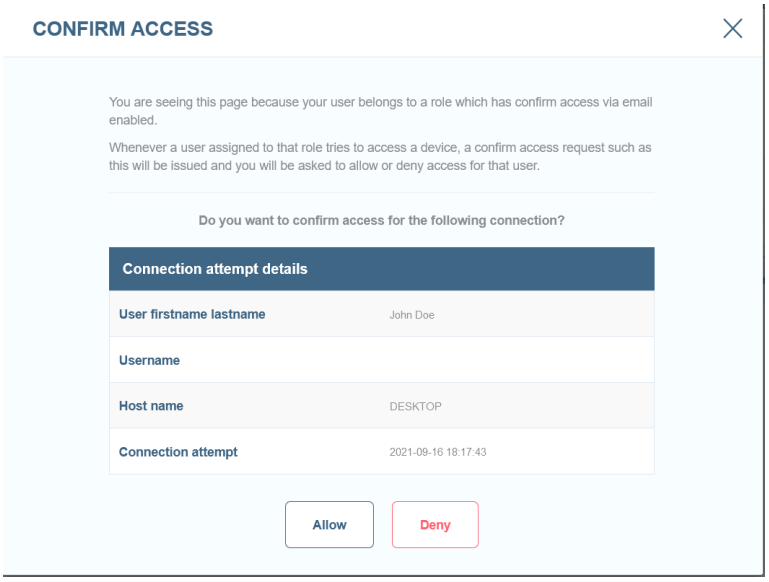
4.4.9 Remove role assignments

To remove role assignments, go to the **Role assignments** tab, select the items you want to remove and above the content area click on the **Remove** button. A confirmation dialogue is displayed. To remove the selected role assignments, click on **Yes**.

4.4.10 Confirm Access role

Starting with **Netop** version 12.67 for Windows **Hosts** and 12.70 for Linux and macOS **Hosts**, the **Confirm access** functionality was added, and starting with version 12.82 for Windows **Hosts** the **Confirm access via email** feature was introduced. The **Confirm access** feature provides improved security by adding a confirmation dialog on the end-user side (**Host** side).

The **Confirm access via email** feature is configured along with a user group. Once **Confirm access via email** is triggered, all the users in that group receive an email requesting them to provide access to the **Host**. The email contains a confirm access link, the name of the user requesting access, and the name of the **Host**. Once the link in the email is clicked on, you are redirected to the **Portal** where you can allow or deny access to the device for the user that requested it.



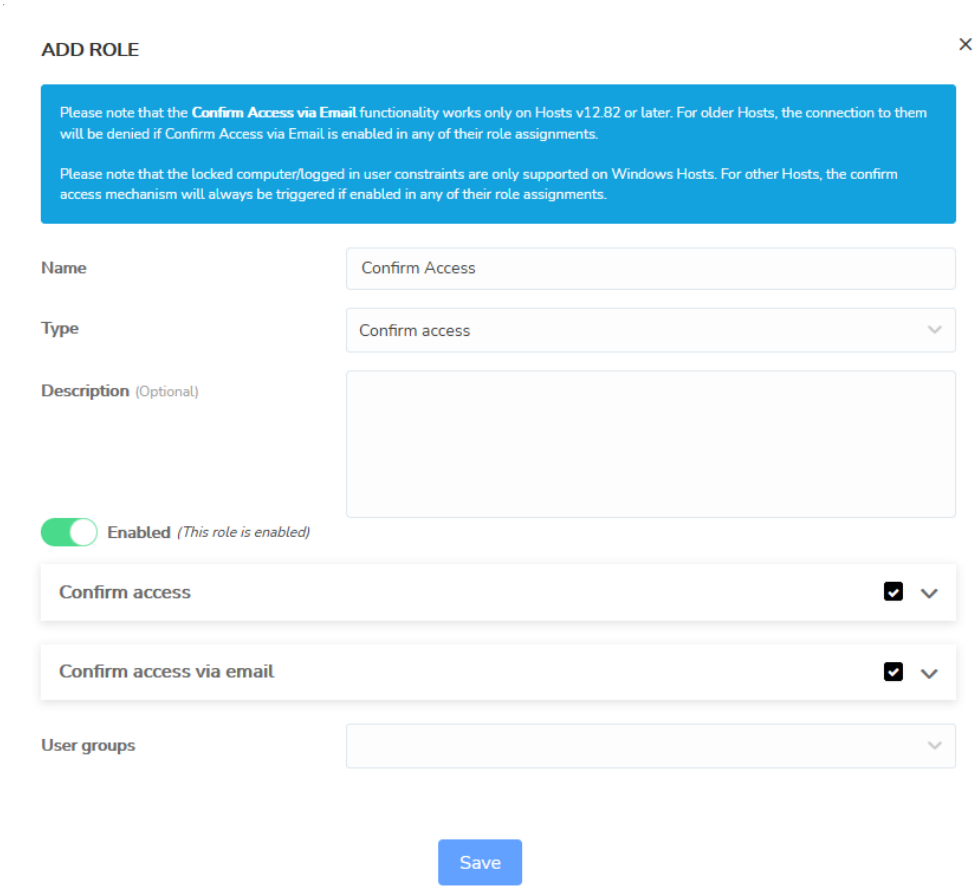
The access granted through the confirm access email is audited.

4.4.10.1 How to add a Confirm Access role

To create a **Confirm Access** role, proceed as follows:

1. Go to the **Roles** tab.
2. Click on the **Add role** button.
3. Specify a name for the role.
4. From the **Type** drop-down list, select the **Confirm access** type.
5. Enable or disable the role.
6. You can use either the **Confirm access** or **Confirm access via email** option or both for the **Confirm access** role. To use the options, select the **Enable confirm access**, respectively **Enable confirm access via email**

checkboxes. If you use **Confirm access via email** you must add a user group or multiple groups that receive an email when a user requests access to a device.



7. To save the changes made, click on the **Save** button.

NOTE: If both the **Confirm access** and **Confirm access via email** features are enabled, whichever type of confirmation happens first, the user is granted access to the **Host**.

4.4.10.2 How to add a Confirm access role assignment

To add the **Confirm access** role to a role assignment, proceed as follows:

1. Go to the **Role assignments** tab.
2. Click on the **Add role assignments** button.
3. Specify a name for the role assignment.
4. Activate the role assignment.
5. From the **Role** drop-down list, select the **Confirm access** role.

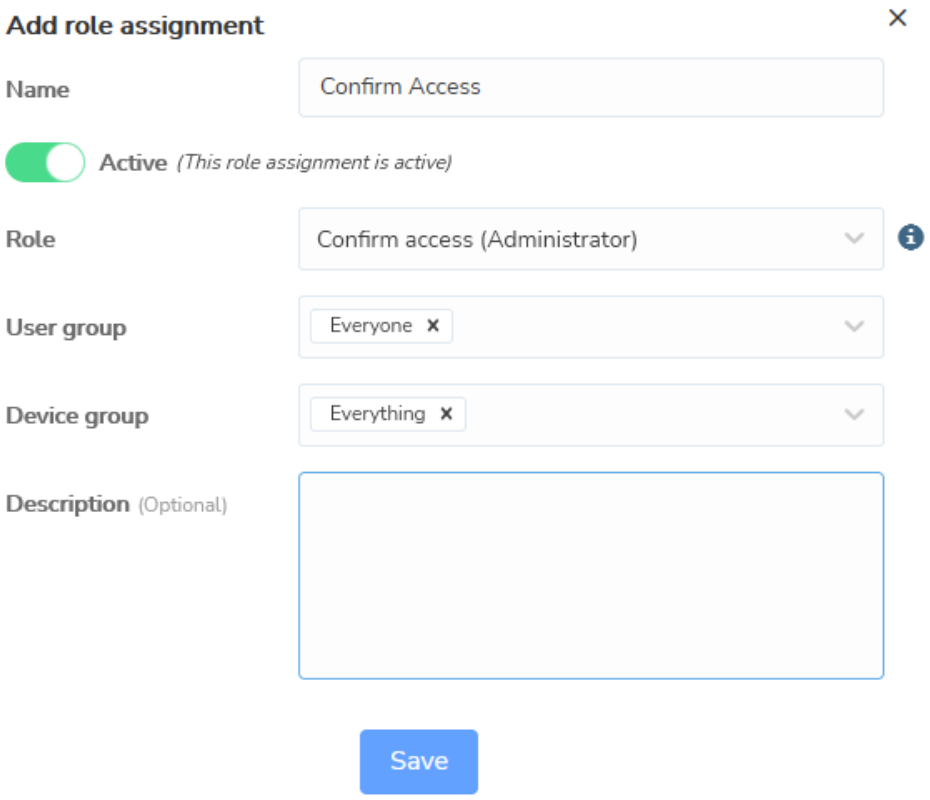
6. Assign the role to a **User group**.

   NOTE: When the **Confirm access via email** option is enabled, you allow or deny access to a device for users that belong to this User group.

7. Assign the role to a **Device group**.

   NOTE: When the **Confirm access via email** option is enabled, you allow or deny access to devices that belong to this Device group.

8. To save the changes made, click on the **Save** button.



.

NOTE:

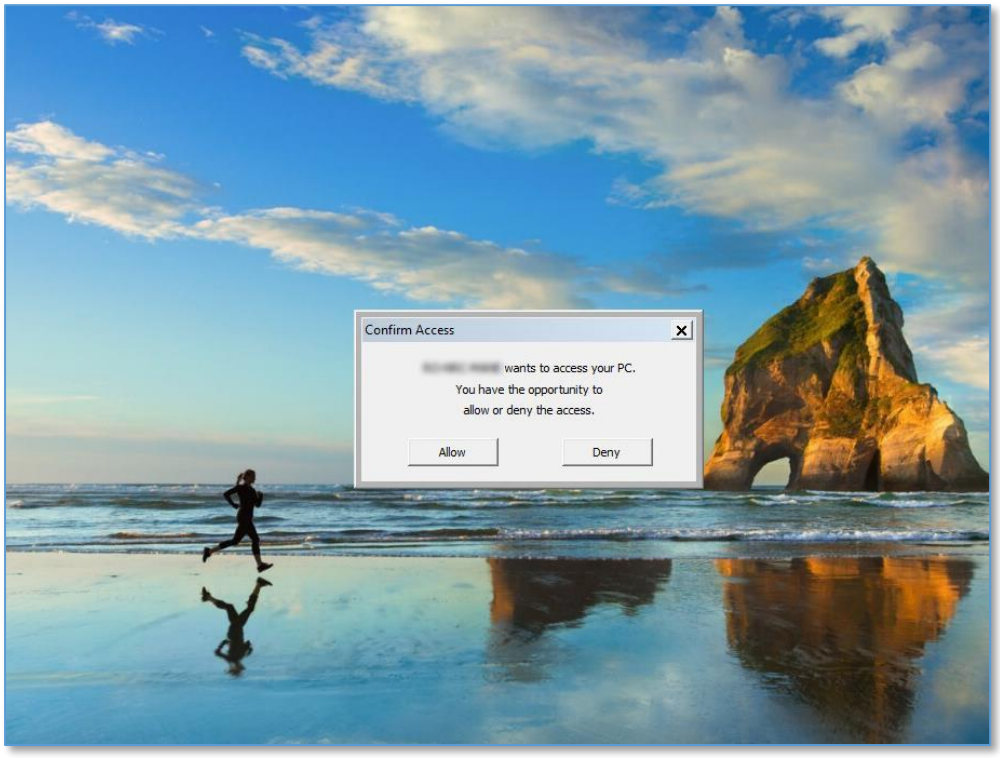
- The **Confirm Access** functionality works only on **Hosts** and **Guests** v12.67 or later. For older **Guests** and **Hosts**, the connection between them is denied if the **Confirm Access** feature is enabled in any of their role assignments.
- The **Confirm Access via email** functionality works only on **Guests** and **Hosts** version 12.82 or later. For older **Guests** and **Hosts**, the connection between them is denied if the **Confirm Access via email** feature is enabled in any of their role assignments.

Once the **Confirm access** is defined, on the next remote session between the **Guest** and **Host**, a confirm access prompt is displayed to the end-user on the **Host** side.

There are two extra exceptions when the **Confirm access** and the **Confirm access via email** can be set to be overruled even though it is enabled.

For Confirm Access:

- **Except when computer is locked** - if the computer is in the locked screen.
- **Except when no user is logged in** - if no user is logged into the system.



For Confirm access via email:

- **Only when computer is locked**
- **Only when no user is logged in**

When confirmed, the remote session is initiated. If denied, the confirm session is not initiated.

NOTE: The exceptions for **Confirm Access** and **Confirm access via email** do not apply to the macOS and Linux Hosts.

4.4.11 Whitelisted applications role

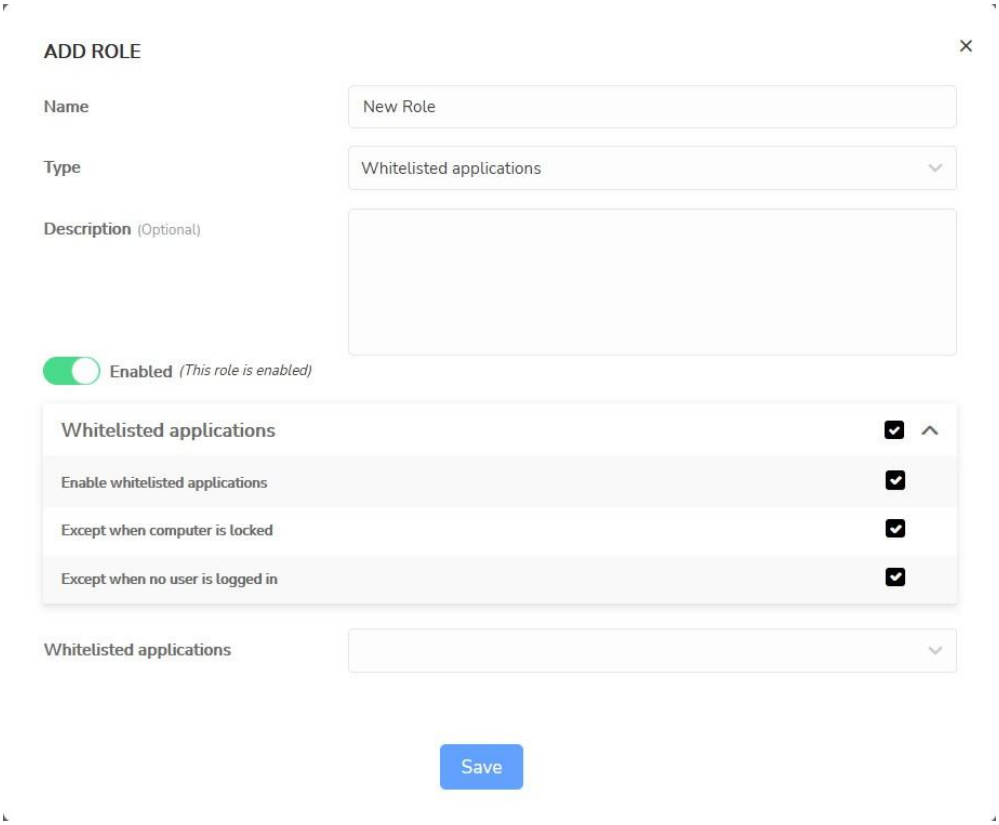
Starting with **Netop** version 12.74 for Windows **Hosts**, the capability of whitelisting applications is available. With whitelisted applications, users can restrict remote control sessions to a single application (or list of applications) on the **Host** device. This includes viewing the screen and using the keyboard and mouse for those applications.

4.4.11.1 How to add a Whitelisted applications role

To create a whitelisted applications role, proceed as follows:

1. Go to the **Roles** tab.
2. Click on the **Add role** button.
3. Specify a name for the role.
4. From the **Type** drop-down list, select the **Whitelisted applications** type.
5. Enable or disable the role.
6. Edit additional **Whitelisted applications** options.
7. Select the application(s) to be whitelisted.

8. To save the changes, click on the **Save** button.

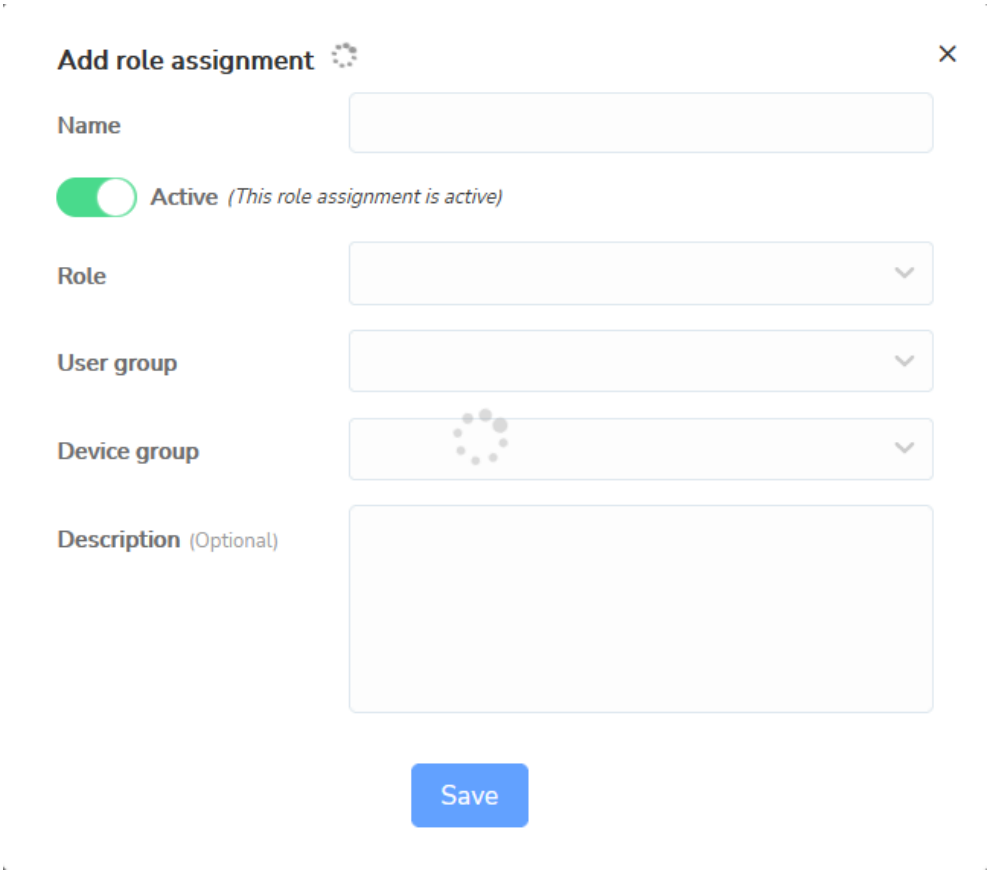


4.4.11.2 How to add a Whitelisted applications role to a role assignment

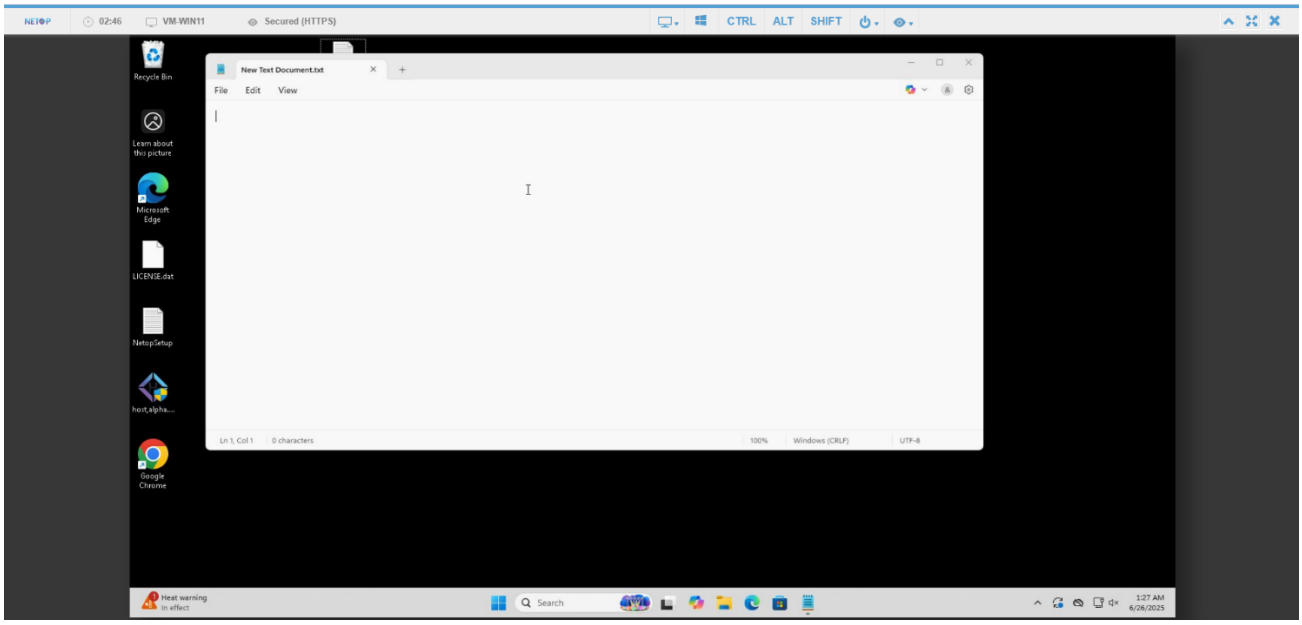
To add a whitelisted applications role to a role assignment, proceed as follows:

1. Go to the **Role assignments** tab.
2. Click on the **Add role assignment** button.
3. Specify a name for the role assignment.
4. Activate or deactivate the role assignment.
5. From the **Role** drop-down list, select the whitelisted application's role.
6. Select the **User group**.
7. Select the **Device group**.

8. To save the changes made, click on the **Save** button.



Once the whitelisted applications are enabled, on the next remote session between the **Guest** and **Host**, only these apps are visible to the user.



There are two extra exceptions when the whitelisted application can be set to be overruled even though it is enabled:

- **Except when computer is locked** - if the computer is in the locked screen.
- **Except when no user is logged in** - if no user is logged into the system.

In either of these exceptions, the whitelisting applications are not enabled throughout the session.

NOTE: The role assignment automatically becomes disabled if all the applications that are set as part of the whitelisted applications become disabled.

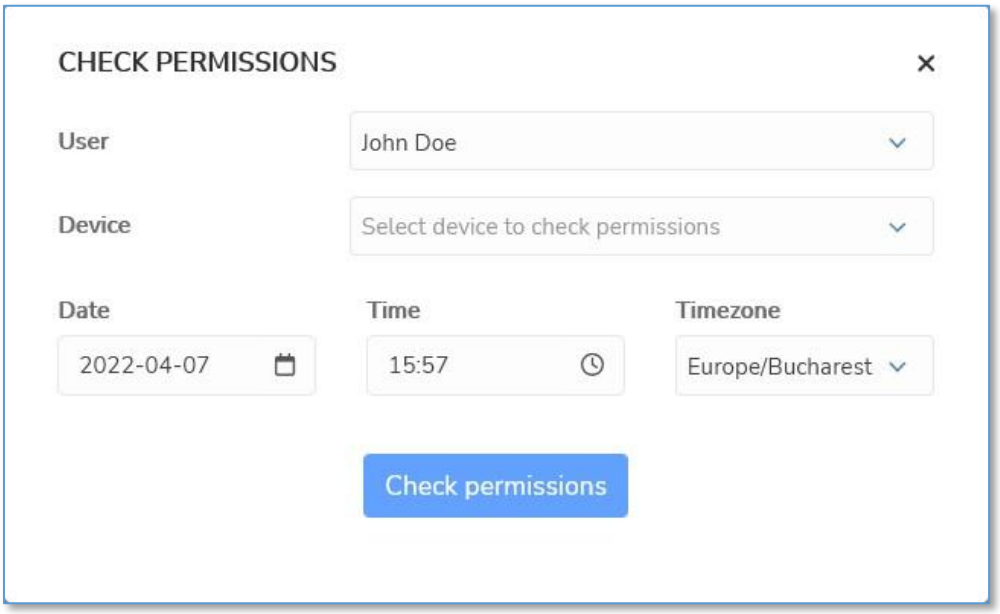
For more information on whitelisted applications, refer to the following knowledge base article.

4.4.12 Check permissions

To verify the permissions of a user on a certain device, use **Check permissions**.

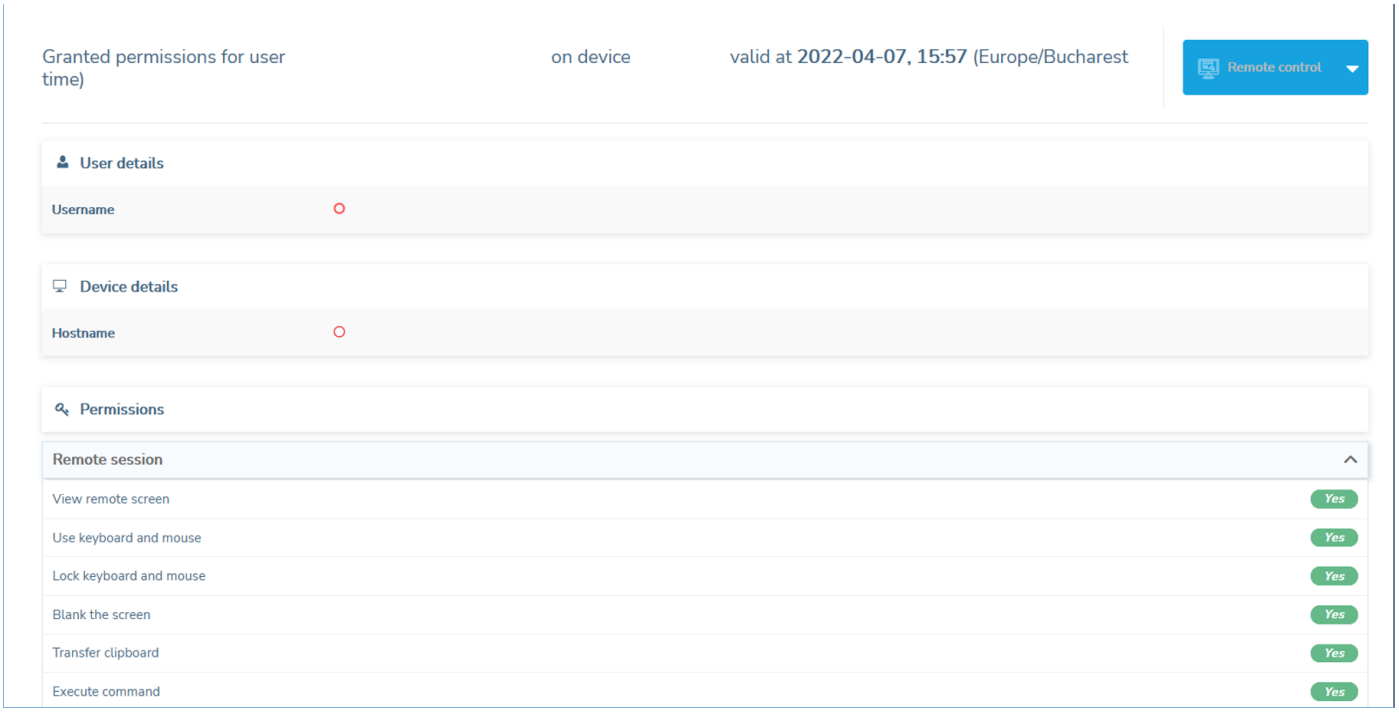
1. Click on the **Check permissions** button. It is available in different areas of the **Portal** (Role assignments, Device view, User view).

2. Select the User and the Device.



3. Since permissions can change in time due to existing schedules applied on the Role Assignments, you can specify a date to check for the permissions.
4. Specify the time for the permissions.
5. Specify the **Timezone** for the permissions.

6. To view the granted permissions, click on the **Check permissions** button. This provides an overview of the exact permissions of the User on the Device, plus an overview of the Role assignments that involve both the User groups and the Device.



4.5 Downloads - using Deployment Packages

The deployment package represents a way of enrolling the devices into the **Portal**. The deployment package describes among other things the interval in which the **Host** can be installed, for how many installations or what device group belongs to on enrollment.

Prerequisites for deployment packages:

- Windows **Host** running version 12.65 or later
- Linux & macOS **Host** version 12.75 or later

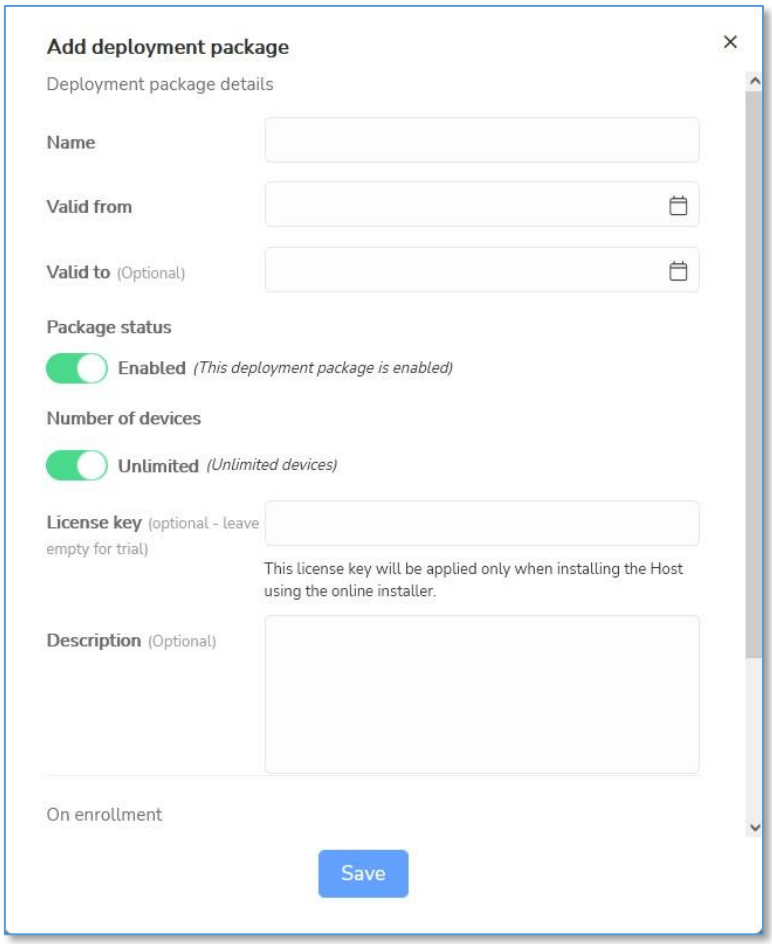
For versions earlier than the above, refer to the Role assignments sub-chapter on how to enroll them.

The **Manage** > **Downloads** tab allows the management of deployment packages.

NOTE: Account administrators or higher can manage deployment packages.

4.5.1 Create a deployment package

To create a deployment package, click on the **Add deployment package** button in the upper-right corner of the Deployment Packages page. The **Add deployment package** window is displayed.

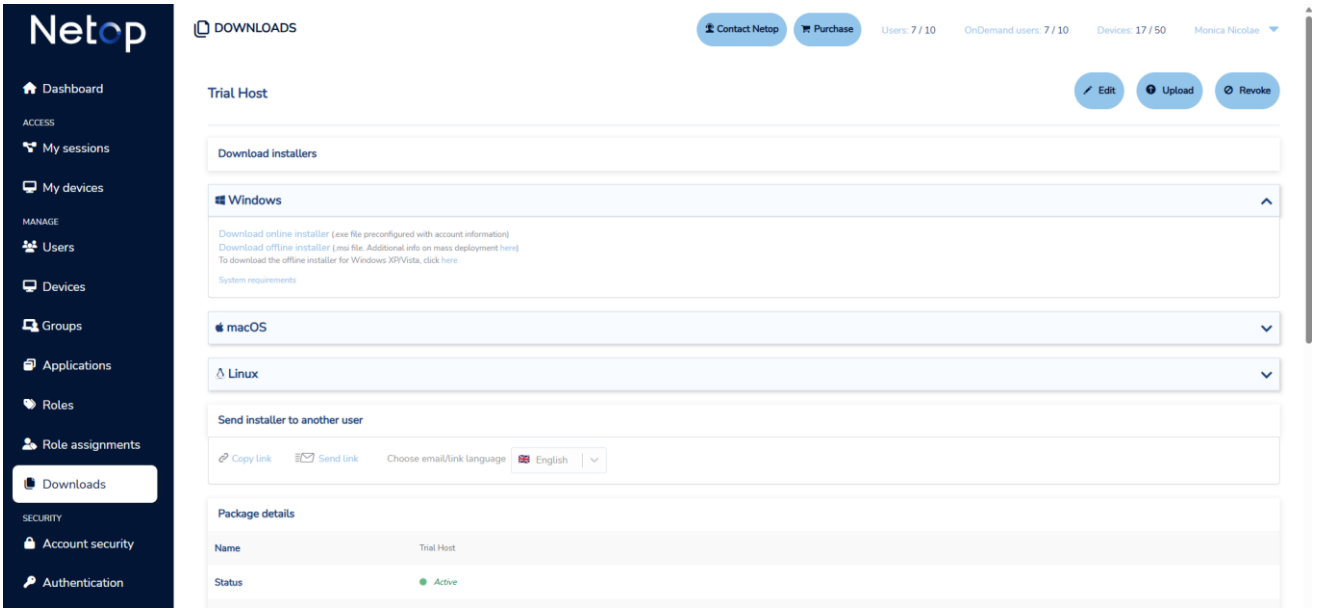


Specify the deployment package details.

Setting	Description
Name	The name of the deployment package.
Description	Optional description of the deployment package.
Valid from	The **Host** can be installed using this **Enrollment key** only when starting with this date (the time is UTC based).
Valid to	The **Host** can be installed using this **Enrollment key** only before this date (the time is UTC based). If no date is

Setting	Description
	selected, the enrollment key has no expiration date.
Number of devices	The number of devices, which can be enrolled using this **Enrollment key**.
Package status	Indicates whether the **Enrollment key** can be used or not. If disabled, new device enrollments do not work. Already enrolled devices continue to work.
License key	This is the license key that is applied to the **Host**. If empty, the **Host** is set to **Trial mode**. If the **Trial mode** expired, the **Host** converts to a **Portal only** mode, which allows only the **Portal** communication profile (only works with a **Portal** account).
Move to device group	The group to which the device automatically belongs to on enrollment.
Enrollment state	Specify if an administrator is required to review the status of the device (**Pending**) or not (**Enrolled**) before the device is enrolled. Check Pending state for how to enroll pending devices.

Once you've specified all the necessary details, click on the **Save** button. The deployment package is created. Upon creation, a unique **Enrollment key** and **Online installers** are generated.



To view the enrollment key, from the Deployment packages list, click on the name of the deployment package.

4.5.2 Download and install the Host using default configuration

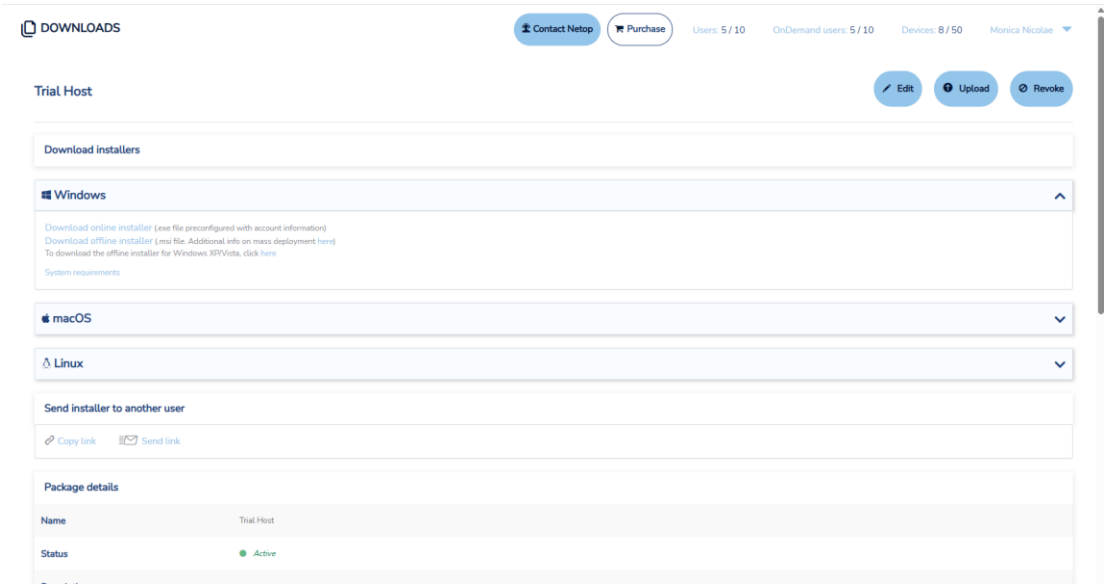
When a deployment package is created, an online installer is also generated. The online installer uses a default configuration for setting up the latest version of the Windows **Host**. When installing the **Host** using an online installer, an available internet connection is necessary as the files are retrieved from online. You can find offline installers for all the supported platforms in the **Deployment Package** details page.

4.5.2.1 Download and install the Host using an Online installer (.exe file)

To download and install the **Host** using the online installer, proceed as follows:

1. Go to the **Downloads** tab.
2. Click on the deployment package that you want to install. The **Deployment package details** page is displayed.

3. Download the **Online installer** available in the **Download installers** section.



NOTE: Do not change the name of the online installer. Otherwise, the deployment package installation is unsuccessful.

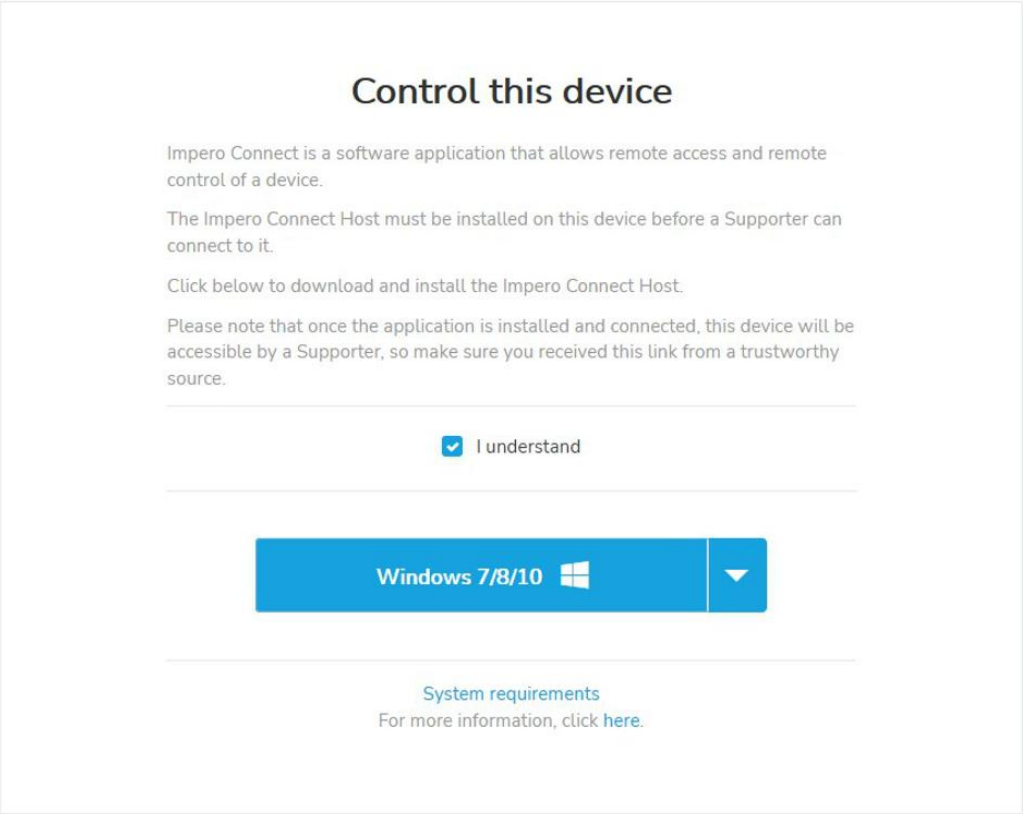
4. To install the deployment package, double-click on the downloaded installer (admin rights are necessary on the device).
5. Read and accept the **Netop License Agreement**.
6. Click on the **Next** button.

The **Host** is installed and automatically configured to connect to the associated **Portal** account. Further configurations are no longer necessary.

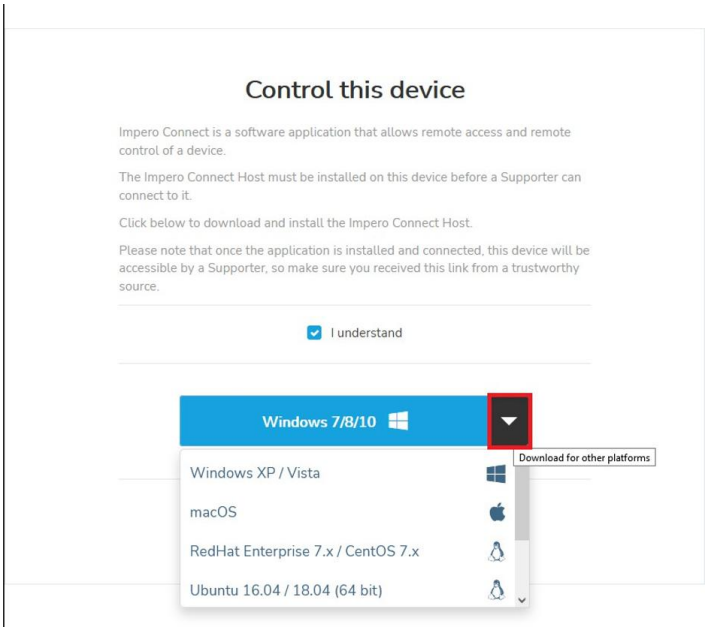
4.5.2.2 Share the Online installer link

1. If you would like to share a unique link with the online installer, click on the **Copy link** button to copy it into the clipboard or click on the **Send link** button to open your email client with the link.

2. On the target device, the user can open the link. By clicking on **I understand**, the user can download and install the **Host**.



3. Users can download the **Host** for a different OS platform, by clicking on the dropdown button near the **Download** button and click on the respective OS button.

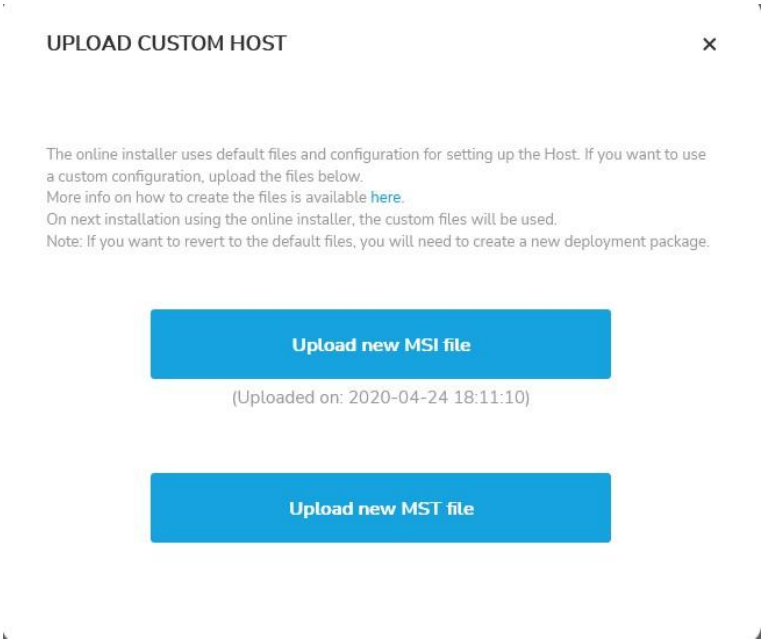


4. Install the online installer as described above.

4.5.3 Download and install online installer using a custom Host configuration (Windows)

If you want to use a custom **Host** configuration, create the configuration file (.**MST** file). Refer to the Pack'n'Deploy User's Guide for information on how to create custom **Host** configuration files using **Netop**.

Once you created the custom **Host** configuration file, go to the deployment package details page and click on the **Upload** button. Upload the .**MSI** and the .**MST** files.



After uploading an .**MSI** or an .**MST** file, the date and time when the file was uploaded are displayed under the corresponding upload buttons. This allows you to easily identify if the deployment package contains a custom **Host** configuration or if the default online installer is used for deployment.

On the next installation using the online installer, the custom files are used.

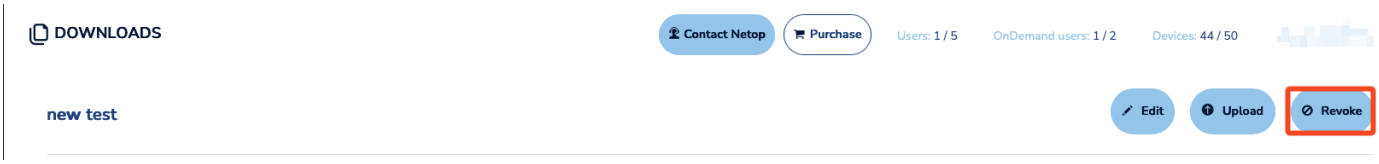
NOTE: To revert to the default files, create a new deployment package.

4.5.4 Mass deploy the Host (Windows)

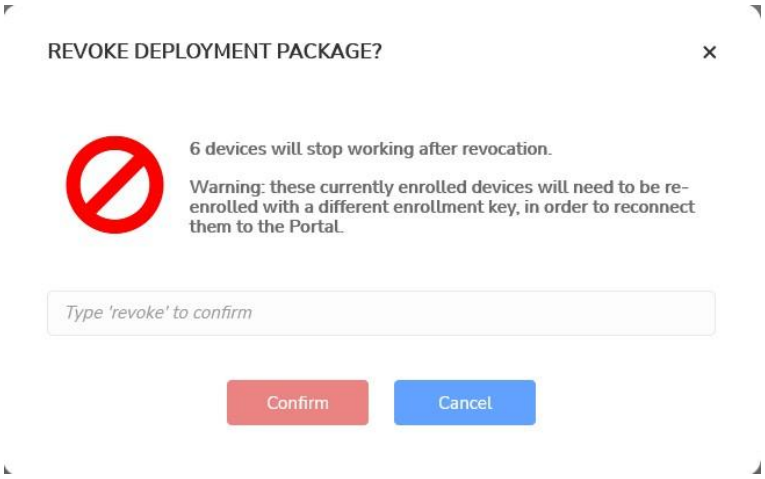
For instructions on how to mass deploy the **Host** on Windows, refer to the Mass deploy Portal components knowledge base article.

4.5.5 Revoke deployment packages

You revoke the deployment packages by clicking on the **Revoke** button in the upper-left corner of the **Deployment package details** page.



The **Revoke Deployment Package** warning prompt is displayed.



Specify "***revoke***" in the "**Type "revoke" to confirm**" entry field to confirm.

Revoking deployment packages means that:

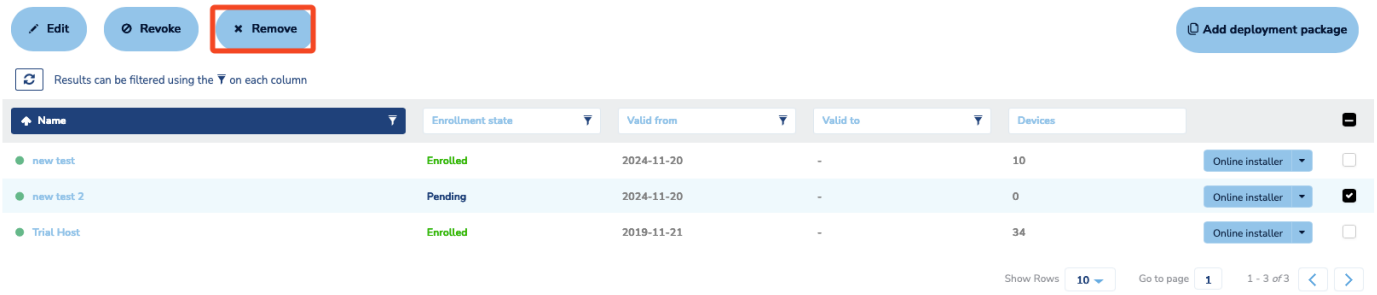
- You are no longer able to install devices using that enrollment package.
- Devices enrolled using the deployment package, can no longer connect to the **Portal**; another enrollment key is necessary.
- Revoked devices are still displayed in the device list with a state name **Revoked**.

The revoked deployment package is marked with a red sign: ⊘

To re-enroll these devices into the **Portal**, create another deployment package and configure the **Host** on the devices to use the new enrollment key.

4.5.6 Remove deployment packages

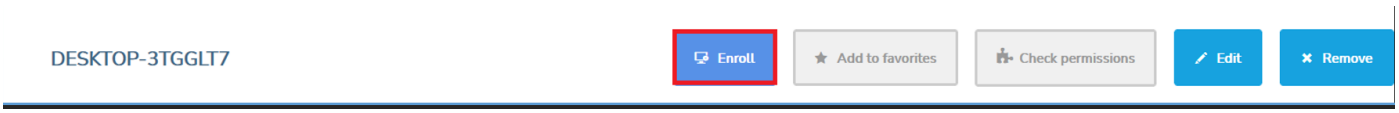
You can remove deployment packages by clicking on the **Remove** button in the upper-left corner of the Deployment package details page.



NOTE: You can only remove deployment packages that have no devices associated or which are revoked.

4.5.7 Pending state

For devices in the **Pending** state, go to the **Manage** > **Devices** tab. Identify the **Pending** device and enroll it by clicking on the **Enroll** button.



5 Security

This section provides various options for overall account security.

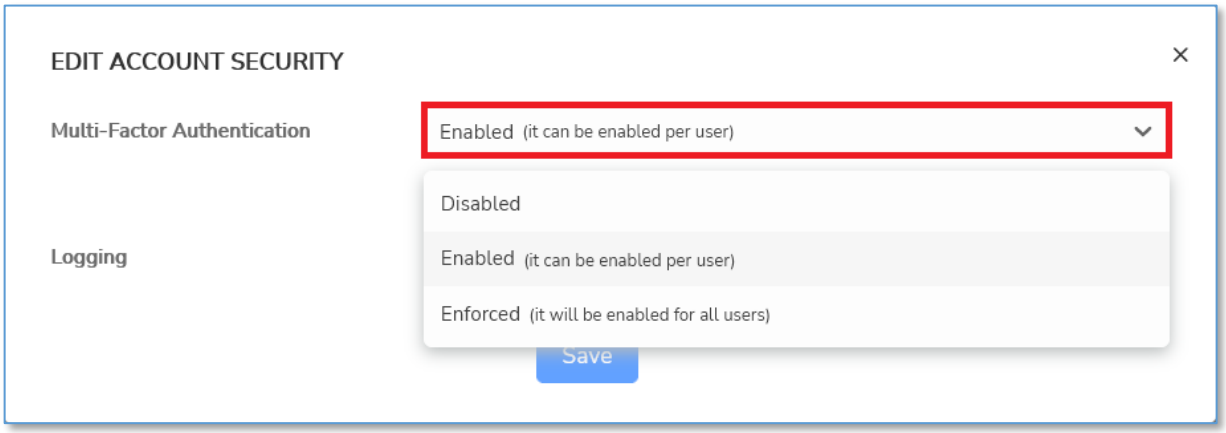
5.1 Enable Multi-Factor authentication

The authentication can be configured to use two factors: the first authentication factor is the username and password (something the user knows), the second factor is a passcode received by email (something the user has).

To manage the account security, administrator rights or higher are necessary. You have the option to enable MFA per user or to enforce the option to all users. When the **Enforced** option is selected, users cannot modify the Multi-Factor authentication settings for themselves or other users.

To enable or enforce the multi-factor authentication, proceed as follows:

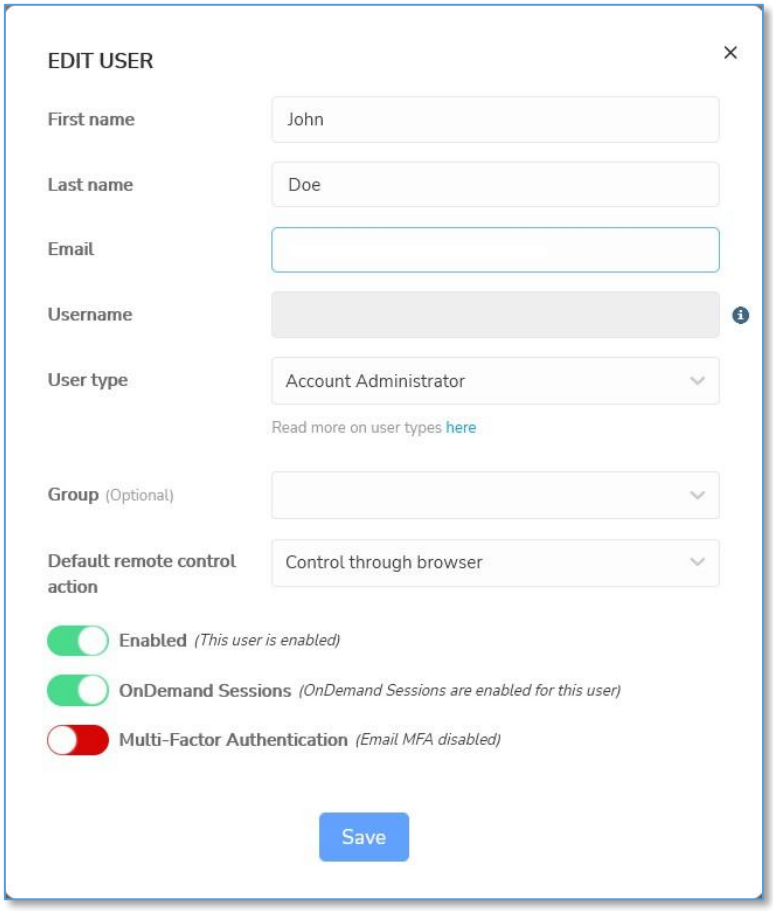
1. Go to **Security** > **Account security** area and click on the **Edit** button.
2. Click on the **Multi-factor authentication** dropdown field.
3. Select **Enabled** or **Enforced**.
4. Click on the **Save** button.



Once email-based multi-factor authentication is enabled for your account, you can enable the use of multi-factor authentication on individual users.

When editing users, you can now enable multi-factor authentication as well.

Go to the **Manage** > **Users** tab, select the desired user and in the upper-left corner of the page, click on the **Edit** button.



Enable **multi-factor authentication** and click on the **Save** button.

NOTE:

- User credentials are used to configure the communication profile on both **Guest** and **Host**. For security reasons, we strongly recommend creating dedicated users assigned to enroll devices in the **Portal**.
- If you enable multi-factor authentication for a user, make sure that those user credentials are not used in the definition of the **Guest** or **Host** communication profile (**Portal** communication device). If credentials from a user with multi-factor authentication enabled are used, the **Guest** or the **Host** are not able to make a connection to the **Portal**.
- Starting with Netop version 12.65 (on Windows 7 and later) and **Netop** version 12.75 (Linux & macOS) enrollment keys are

used for the **Portal** communication profile. Therefore, the above note does not apply anymore.

5.2 Authentication

The **Portal** provides the following authentication methods:

- Internal (username & password saved in the **Portal** database)
- **ADFS** (**A**ctive **D**irectory **F**ederation **S**ervices)/**Azure AD**
- **LDAP** (**L**ightweight **D**irectory **A**ccess **P**rotocol)

5.2.1 LDAP authentication

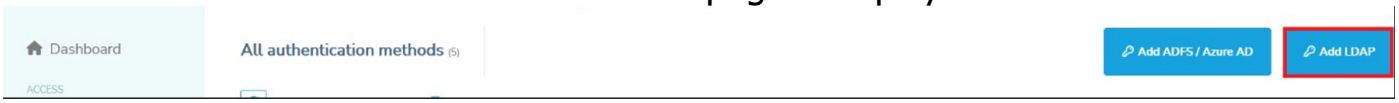
With the integration to the **L**ightweight **D**irectory **A**ccess **P**rotocol (**LDAP**), the **Portal** provides another way of integration into the company's central user directory. This enables administrators to manage the users and users' permissions from only one place – the company's user directory. The integration with **LDAP** is done in such a manner that no passwords are stored in the **Portal** – the credentials are checked on every login.

NOTE: Only account administrators or higher can manage **Authentication**.

5.2.1.1 Enabling LDAP authentication

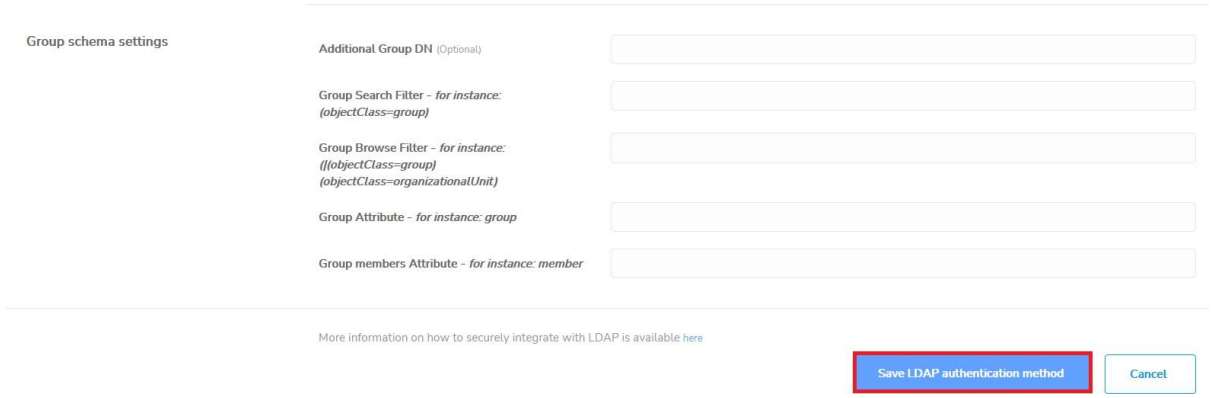
To enable **LDAP** authentication, proceed as follows:

1. Go to the **Security** > **Authentication** tab.
2. In the upper-left corner of the page click on the **Add LDAP** button. The **Add LDAP authentication method** page is displayed.



3. Enable **LDAP** authentication.
4. Specify the information for setting up the **LDAP** connection.

5. To save the authentication settings, click on the **Save LDAP authentication method** button.



Once you enable the **LDAP** authentication, you can import LDAP groups in the create role assignments for each of the groups to associate with the corresponding role.

NOTE: When logging in using **LDAP** credentials, make sure to log in using the domain `identifier\username`. There can be multiple **LDAP** authentication methods added.

5.2.2 ADFS/Azure AD authentication

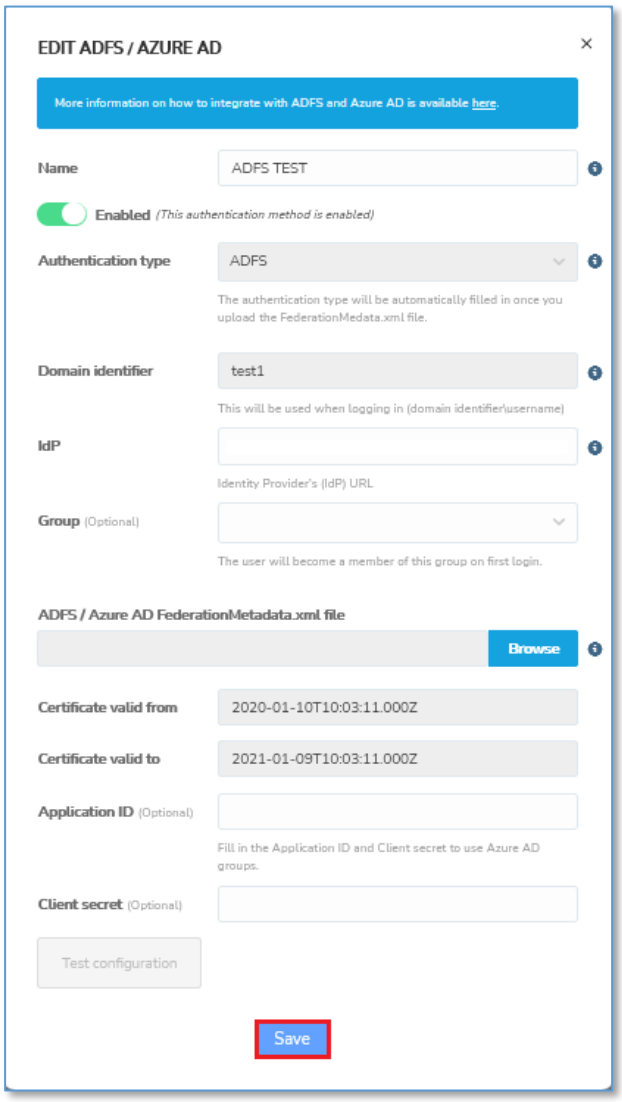
5.2.2.1 Enabling ADFS/Azure AD authentication

To enable **ADFS/Azure AD** authentication, proceed as follows:

1. Go to the **Security** > **Authentication** tab.
2. In the upper-left corner of the page, click on the **Add ADFS/Azure AD** button. The **Add authentication method** page is displayed.

3. Fill in the information required for the **ADFS/Azure AD** authentication method (for more information, refer to the following knowledge base article).
4. To test the configuration, click on the **Test configuration** button.

5. To add the **ADFS/Azure AD** authentication method, click on the **Save** button.



NOTE: When logging in using **ADFS/Azure AD** credentials, verify that you log in using the domain **`identifier\username`**. There can be multiple **ADFS/Azure AD** authentication methods added.

For more information about the **ADFS/Azure AD** feature and integration with the **Portal**, refer to the following knowledge base article.

5.3 Enable logging

The **Portal** offers thorough audit logs (audit trails).

The audit logs contain the following security-relevant data:

- The date
- Time and activity of each user including sign-in events
- User creation and removal
- Role assignments
- Account configuration
- Remote control sessions
- File transfers and others

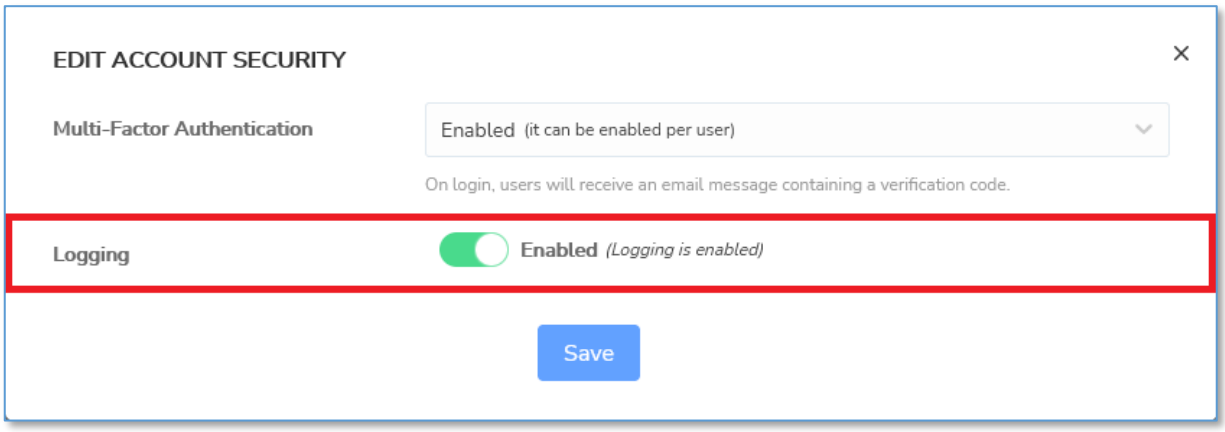
NOTE: The audit log data is stored for a period of six months. This means that the data that exceeds the fixed period is automatically removed. This is done in a chronological order – older data is removed and the more recent is maintained.

Audit logs help you monitor data for any potential security breaches or internal misuses of information. Moreover, the audit logs available in the **Portal** provide an insight into how various parties are using the **Portal**.

NOTE: Audit logs containing information regarding connections between a **Guest** or **Control through browser** option and a **Host** are sent only by Windows **Hosts** version 12.67 or later.

5.3.1 Enabling audit logging

Audit logging is enabled by default within the **Portal**. If for any reason it is disabled for your account, go to the **Security** > **Account security** tab, click on the **Edit** button and enable it. To manage audit logging, administrator or higher rights are required.



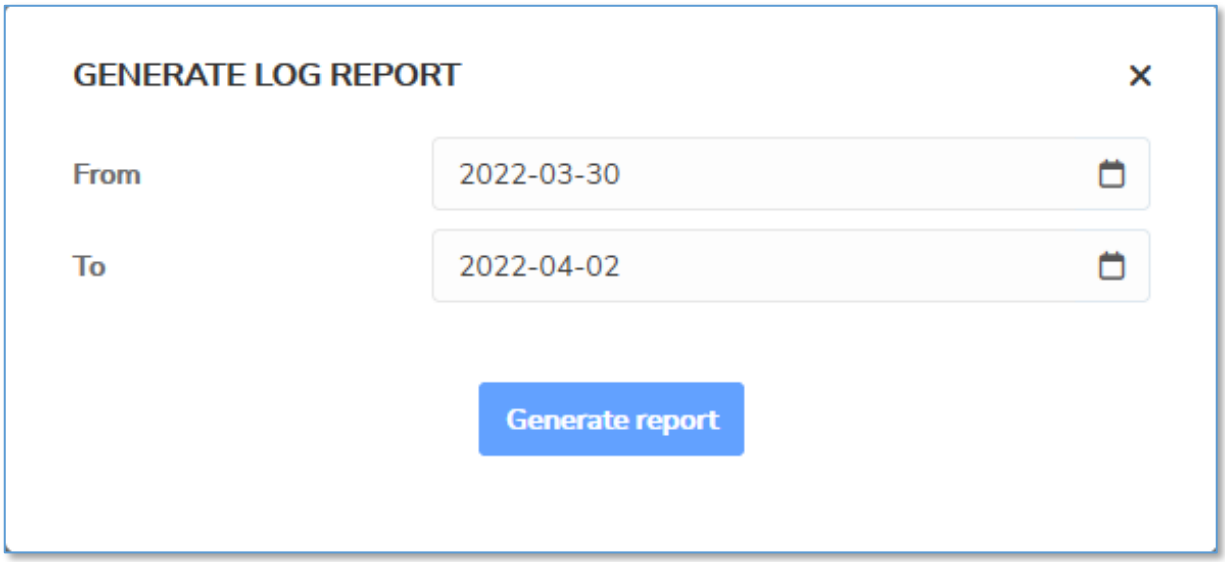
5.3.2 Retrieve Audit Logs

The audit logs provide valuable information about the users' activity in the **Portal**.

NOTE: Account managers or higher can view and generate log reports. Account administrator or higher is required to delete a log report.

To retrieve the audit logs, go to the **Security** > **Logs** tab and click on the **Generate report** button.

Select the date interval:



Click on the **Generate report** button. A new report is created as a `*.csv` file containing all events logged within the selected date interval and it is displayed as a new log entry in the **Logs** page.

Once you generate a log report, from the **Status** column, click on the corresponding **Download** link. On download, choose to save the report on the disk.

To make the report readable, open a blank workbook in Microsoft Excel and import the `*.csv` file by connecting to it (from the **Data** tab and from the **Get and Transform Data** toolbar, click on **From Text/CVS**). Make sure that you use the comma (,) as a column delimiter and the apostrophe (') as the text qualifier.

For more information on understanding the report, refer to the following knowledge base article.

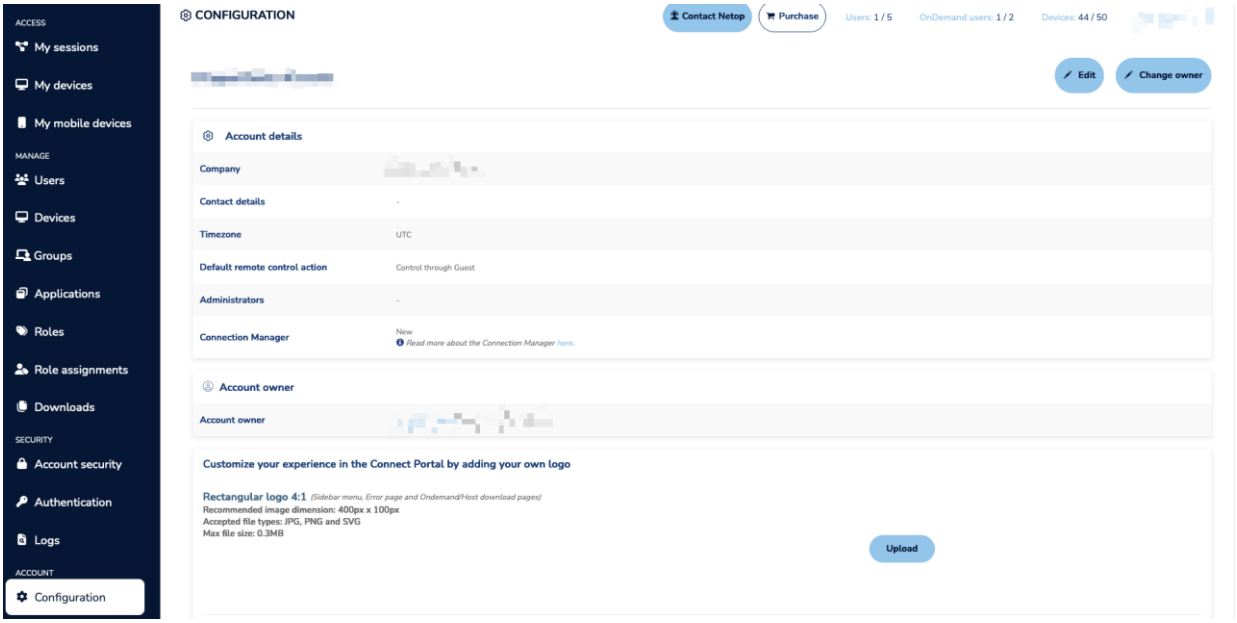
6 Account Configuration

The **Account** > **Configuration** tab allows the configuration of the Account details and the Account owner as well as modify the **Portal** logo. Only an **Account Owner** user type can manage and modify the account configuration.

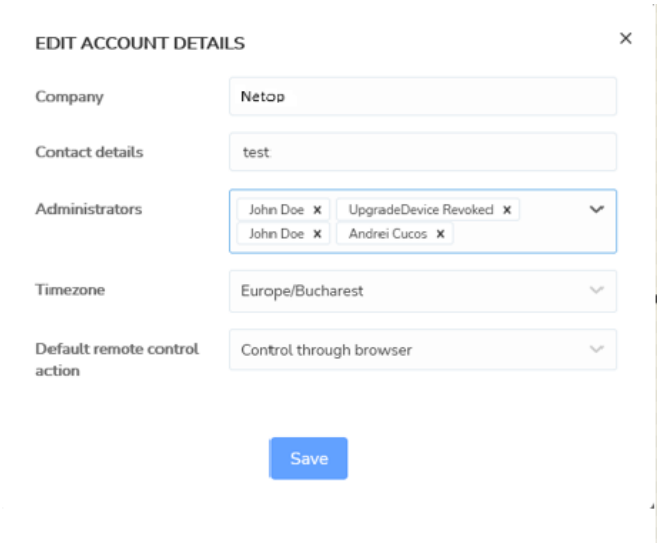
6.1 Account details

The account details contain information on the actual **Portal** account such as:

- The company name
- The contact details
- The account administrators
- The Timezone
- The default remote control action
- The Connection Manager



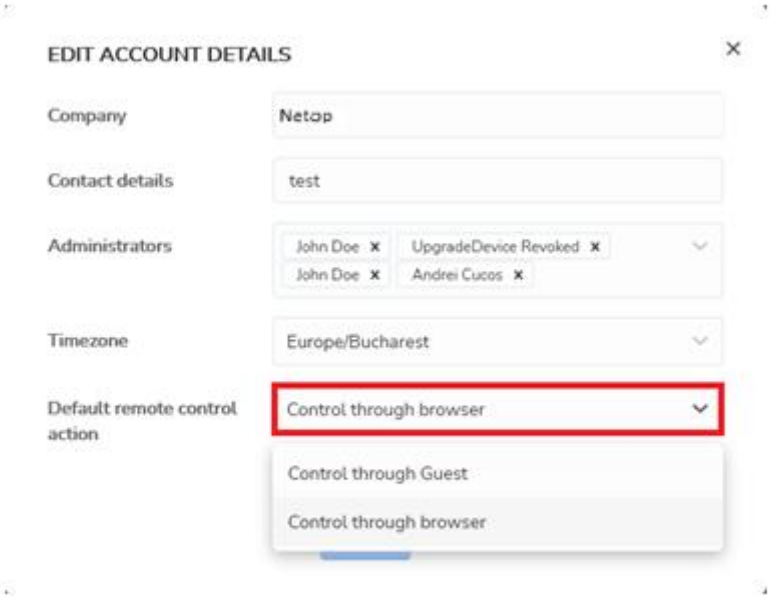
To edit them, click on the **Edit** button.



To save your changes, click on the **Save** button.

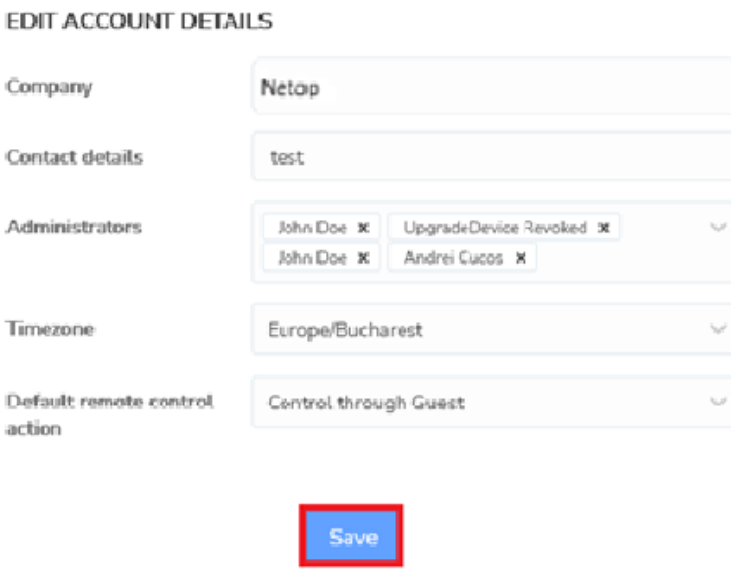
To set up the default remote control action for all the users, proceed as follows:

1. Click on the **Default remote control action** drop-down menu.



2. Select the default remote control action according to your needs.

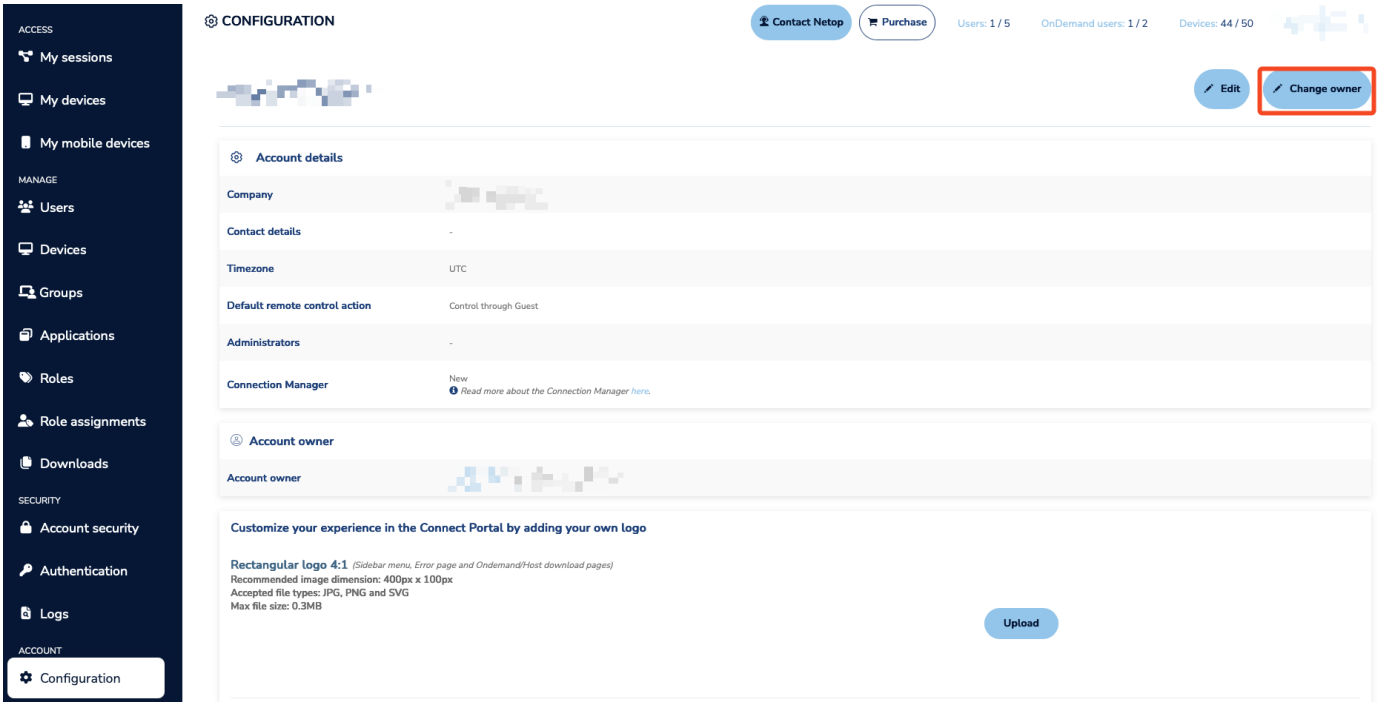
3. Click on the **Save** button to save your changes.



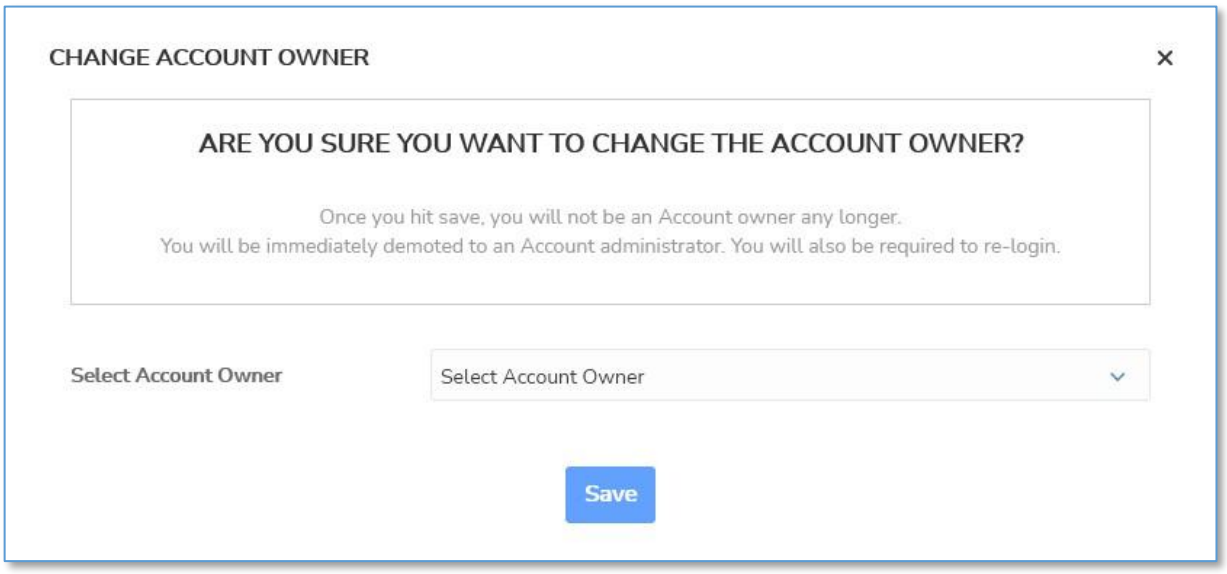
6.2 Change the account owner

To change the **Account Owner**, proceed as follows:

1. Login to the **Portal** with an **Account Owner**.
2. Go to the **Account** > **Configuration** tab.
3. Click on the **Change owner** button in the top-right of the screen.

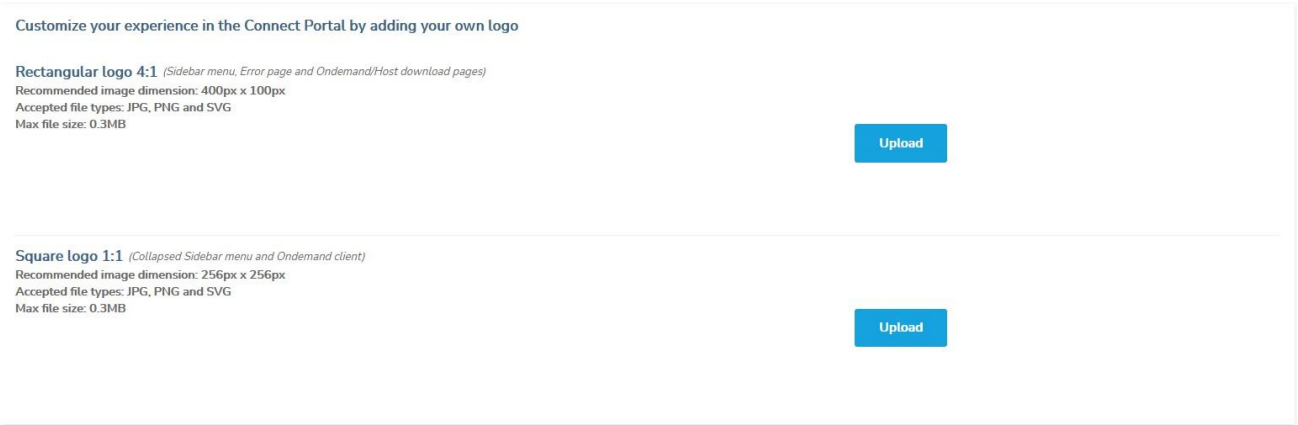


4. Select a user to become the new Account owner and click on the **Save** button.



6.3 Change Portal logo

As the Account Owner you can modify the logo of the Connect Portal. This can be achieved by going to the Configuration tab.



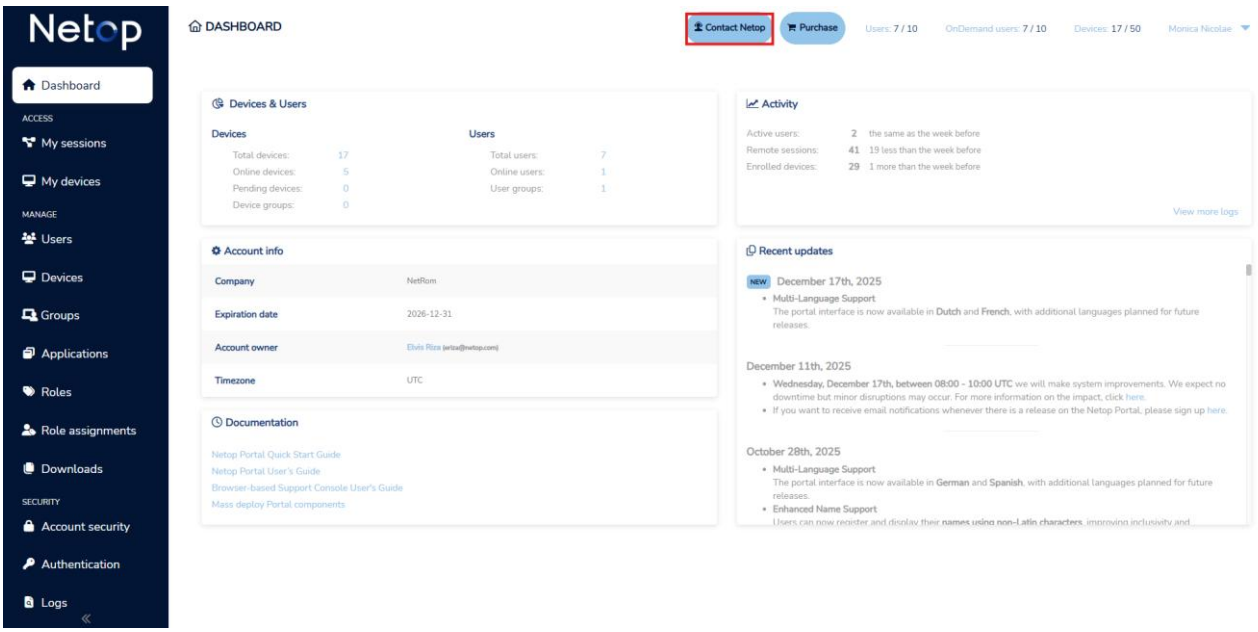
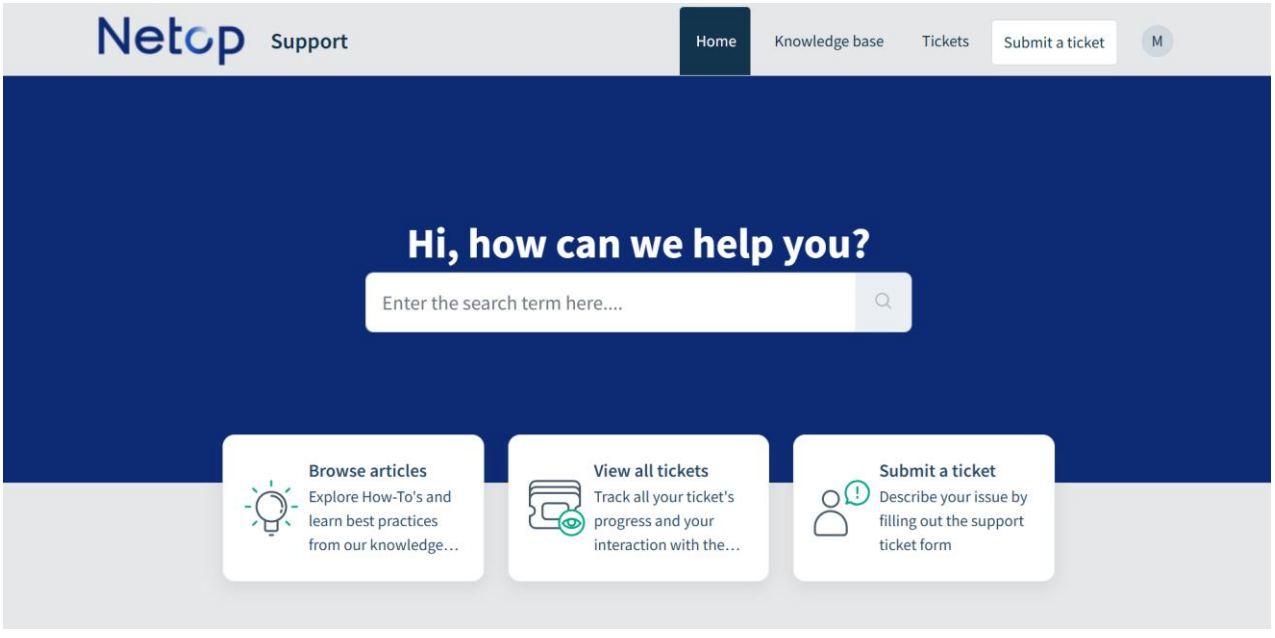
Click on the **Upload** button to upload your custom logo.

7 How to contact the Netop support team

The **Portal** allows users to directly contact an Netop representative in order to receive help as fast as possible.

To contact the **Netop** support team, proceed as follows:

1. Click on the **Contact Netop** button at the top of the page.



2. This will open the **Support Portal** where you can **Submit a request**.