



Manage Technicians

The manage technicians section allows you (Super Admin/Admin) to grant privileges to technicians to conduct remote support and/or unattended access sessions. All technicians added in your organization can access unattended computers by default. However, granting remote support privilege depends on the number of remote support technician licenses you've purchased. You can choose to change the privileges while sending an invite or even after the technician has joined the organization. Invites can be sent one by one or even to a group of technicians. You can also grant permissions for technicians belonging to specific groups under unattended access.

Steps

1. To Invite Technician(s).
2. Manage Technicians - Custom Role
3. To assign roles or add a new custom role
4. To start monitoring a remote session

To invite technician(s)

1. Go to **Settings** in the top Menu bar.
2. Under **Organization**, select **Manage Technicians**.
3. Click on **INVITE TECHNICIAN**.

Manage Technicians

Users Role(s)

Remote Support: **4 / 6 Technician(s)** [UPGRADE TECHNICIANS]

Live Camera Assistance: **5 / 5 Technician(s)** [UPGRADE TECHNICIANS]

Unattended Access: **5 / Unlimited Technician(s)** [UPGRADE PLAN]

Status: All Role: All [INVITE TECHNICIAN]

Users	Role	Departments & Groups
Accepted (5)		
You (malcolm@zylker.com)	Super Admin	6 Departments & 5 Groups
frida@zylker.com	Admin	4 Departments & 5 Groups
jeff@zylker.com	Technician- Unattended...	2 Departments & 2 Groups
lisa@zylker.com	Technician	1 Department & 4 Groups
jonathan@zylker.com	Technician - External	1 Department & 1 Groups

4. Choose the tab **Invite one by one** to send invites specifically to technicians.

Invite Technicians [X]

Invite one by one Bulk Invitation

Email:

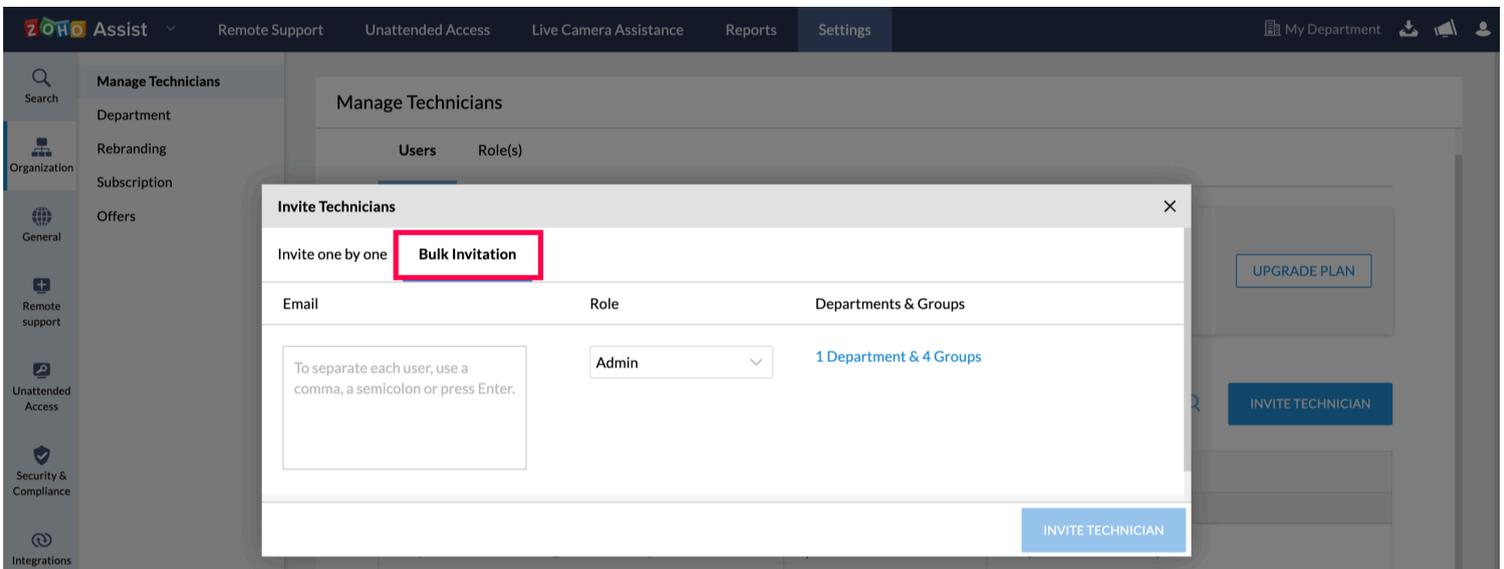
Role: Admin

Departments & Groups: 1 Department & 4 Groups

[Add another email](#)

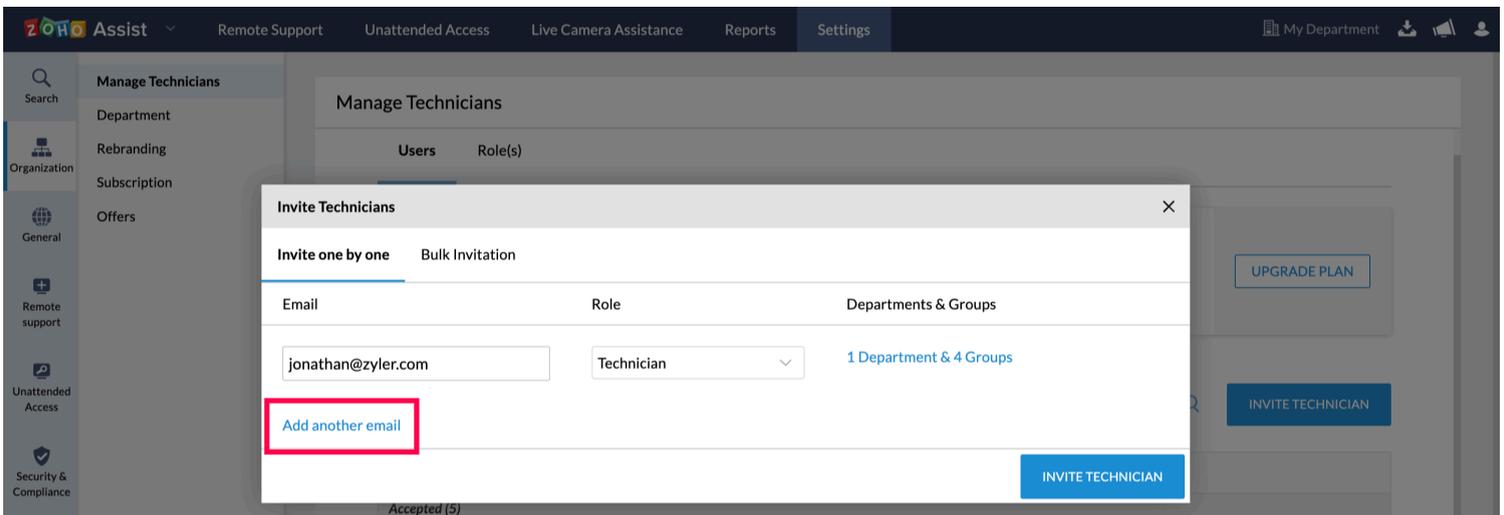
[INVITE TECHNICIAN]

5. Choose the tab **Bulk Invitation** to invite a group of technicians.

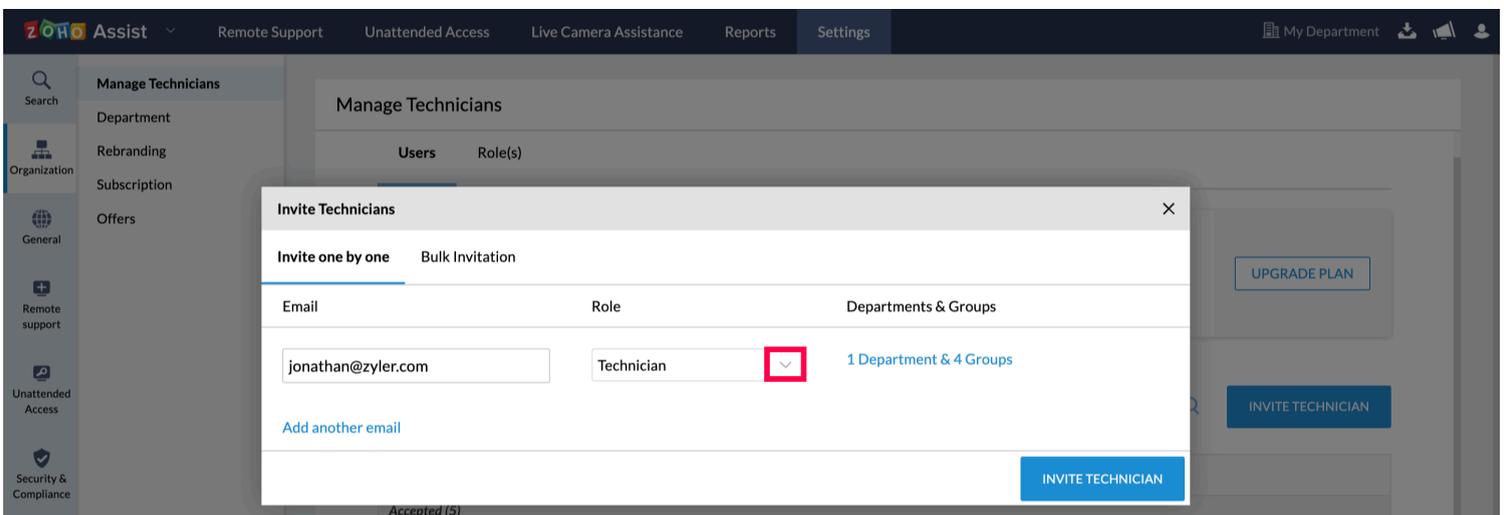


6. Enter the email address of the technician.

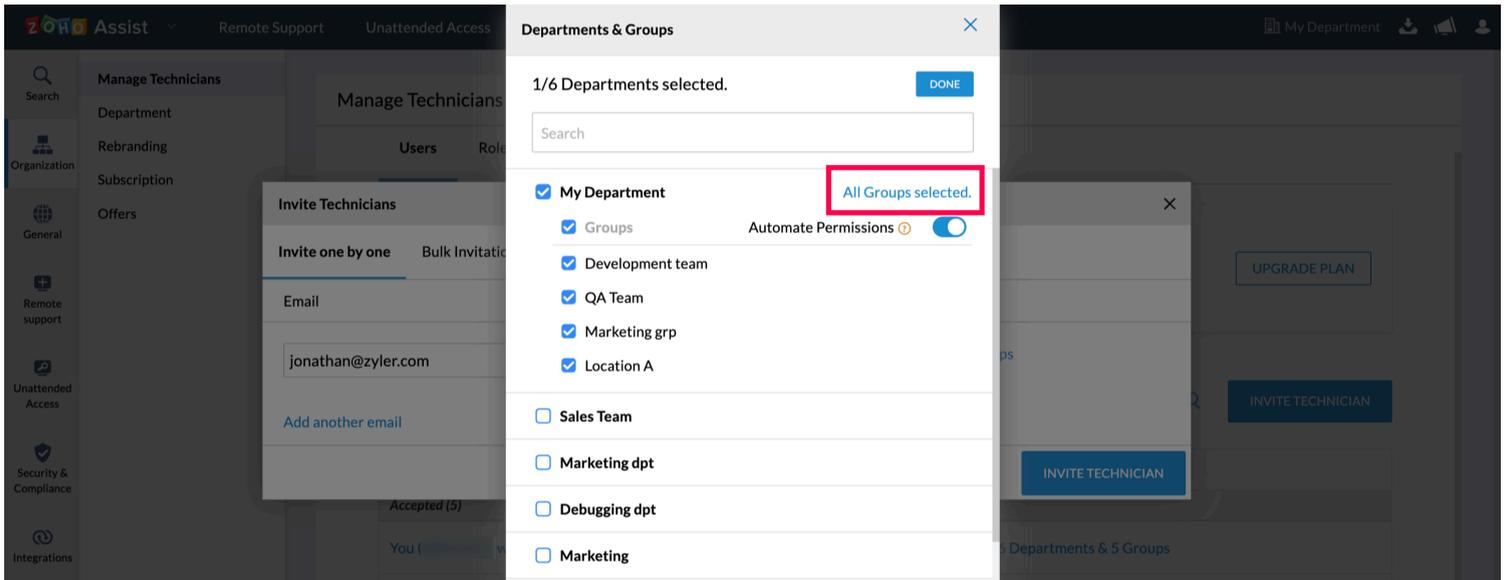
7. Choose **Add another email** given below, to add another email address.



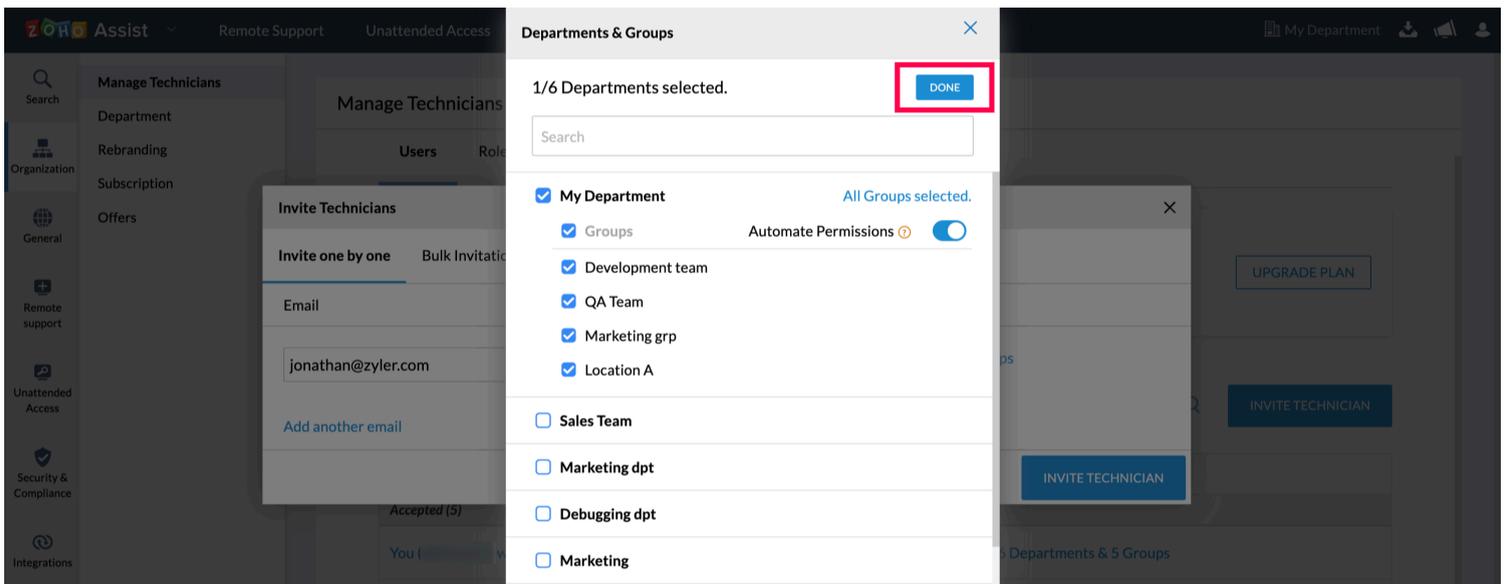
8. You can grant access to a custom role by clicking on the Role drop-down box.



9. To grant access to all the groups, click **All Groups selected** under Departments & Groups.



10. Or you can select the necessary groups and click **DONE**.



11. Now click **INVITE TECHNICIAN** to send the email invite.

12. If the invited technician already has an account with Zoho, they can click on **ACCEPT** to be a part of the organization.

13. If not, the technician would be redirected to our homepage where they would have to sign up with Zoho Assist to be a part of the organization.

Note : The email invitation sent to the technician will expire within 7 days of time.

Manage Technicians - Custom Role

The "Role" option under the manage technician section allows you to assign a designated role to your technicians based on your organizational preferences. You can assign roles such as Super Admin, Admin, and Technician to the members of your organization.

Super Admin - An administrator with access to all privileges.

Admin - An administrator with access to all privileges except that of Rebranding, Two-factor authentication, and Subscription.

Technician - A user with access to conduct Remote Support, Unattended Access, and Screen Sharing sessions.

Privileges	Super Admin	Admin	Technician
Billing	✓	✗	✗
Enable Remote Support/Unattended access	✓	✓	✗
Assign roles	✓	✓	✗
Group Permissions (Unattended access groups)	✓	✓	✗
Preferences	✓	✓	Limited
Rebranding	✓	✓	✗
Email Templates	✓	✓	✗
Integrations	✓	✓	✗
Customer Widget	✓	✓	✗
Contacts	✓	✓	✗
Deployment	✓	✓	✓
Session Confirmation	✓	✓	✗
Wake on LAN	✓	✓	✓

Privileges	Super Admin	Admin	Technician
Reports	✓	✓	Self -conducted sessions only

To assign roles or add a new custom role

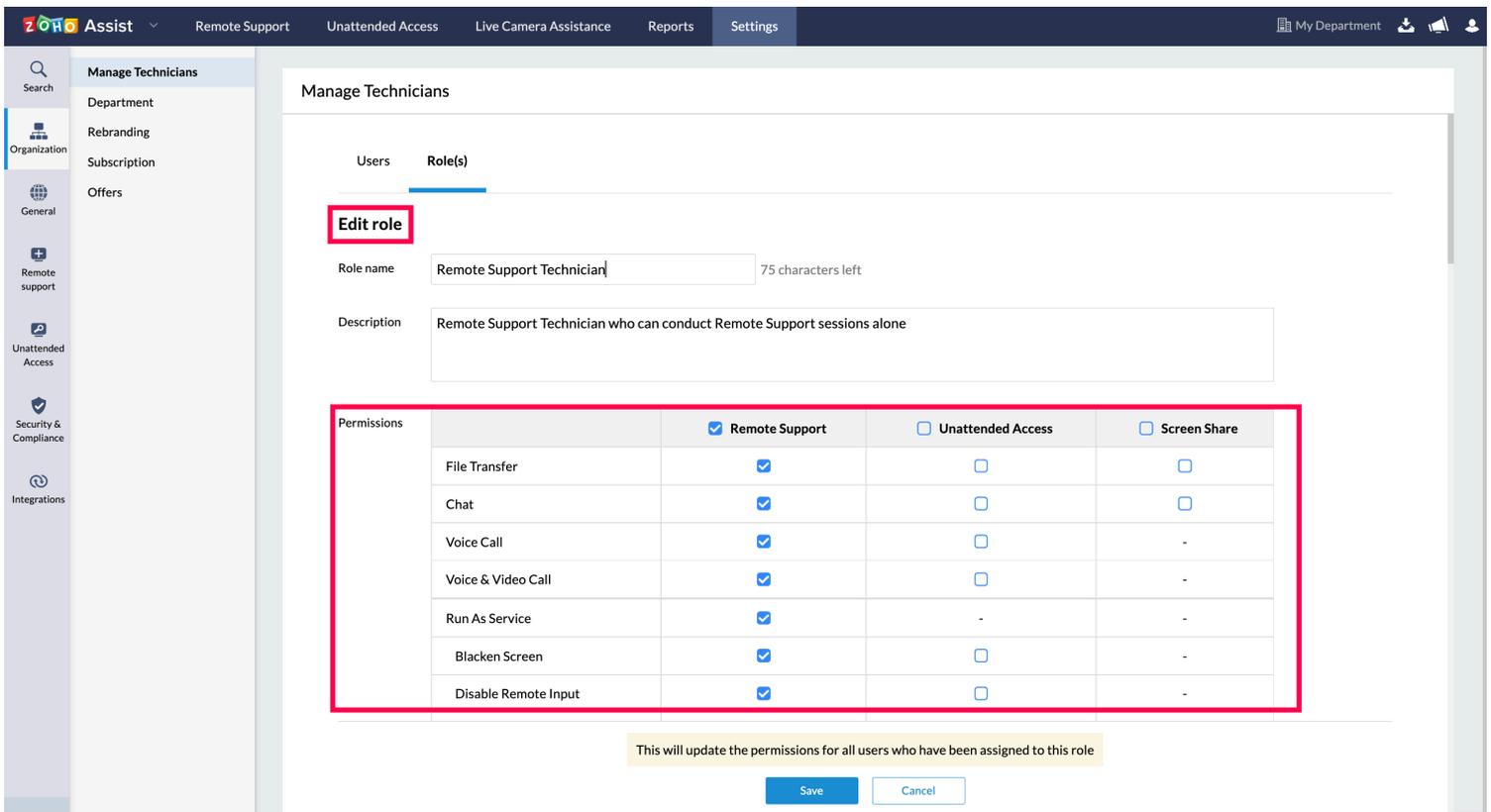
You can assign roles such as Super Admin, Admin and Technician to the members of your organization. **The difference between the Super Admin and the Admin is that, only the Super Admin will have access to the rebranding, subscription and billing details of the account.**

1. Go to **Settings** in the top Menu bar.
2. Under **Organization**, select **Manage Technicians**.
3. Select **Role**.
4. Click on **New Role**.

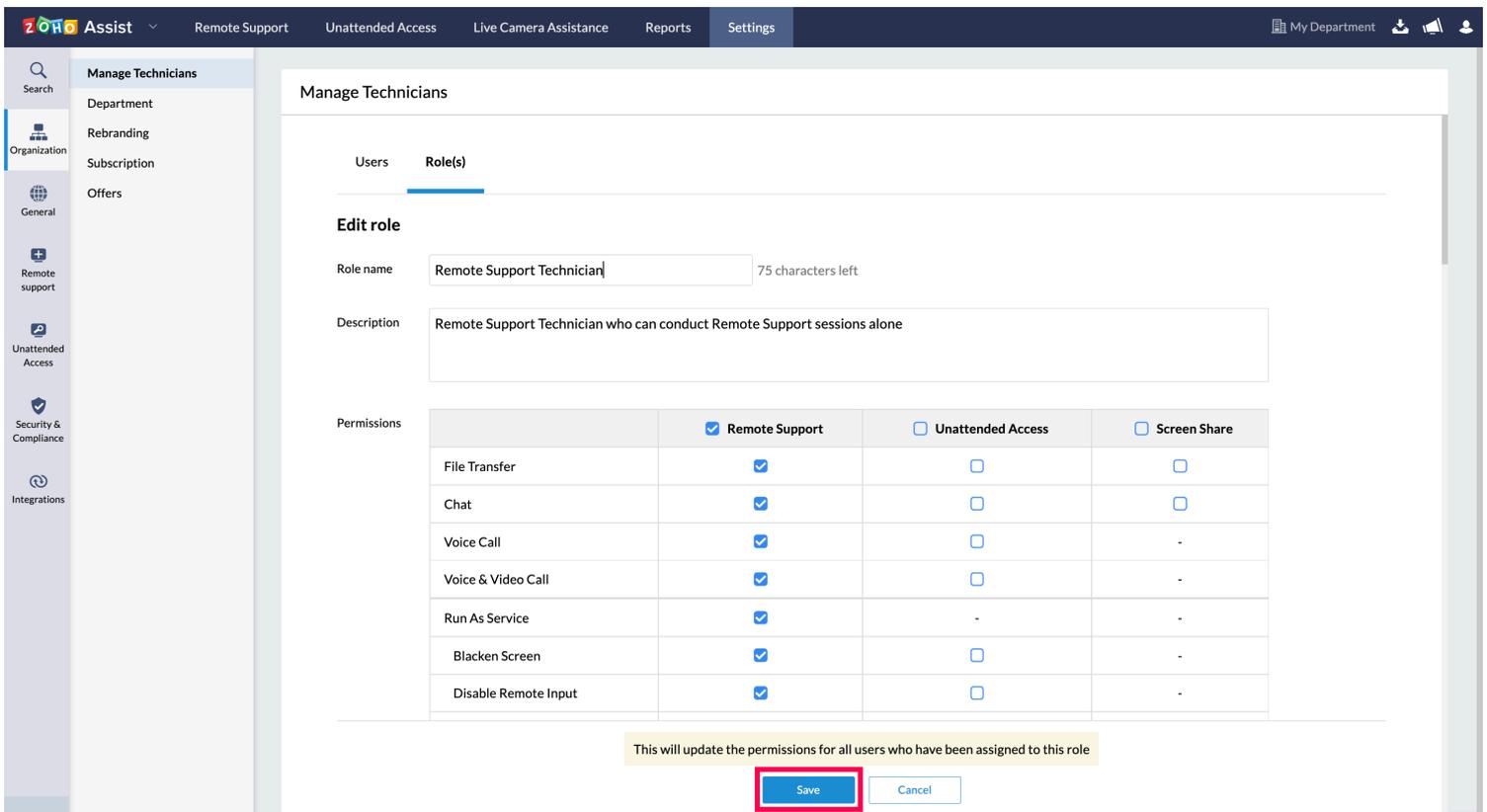
The screenshot shows the 'Manage Technicians' page in the Zoho Assist settings. The 'Role(s)' tab is active, displaying a table of existing roles. A 'New Role' button is highlighted with a red box in the top right corner of the table area.

Role	Description	Created by	Actions
Super Admin	An administrator with access to all privileges.	-	
Admin	An administrator with access to all privileges except that of Rebranding, Two-factor authentication, and Subscription.	-	
Technician	A user with access to conduct Remote Support, Unattended Access, and Screen Sharing sessions.	-	

5. In the new page that appears, fill in the required details such as the custom role name, description and select the permission(s) to be granted.



6. Click on **Save** to save your new custom role.



To grant permission to conduct remote support and/or unattended access

1. Go to Settings in the top Menu bar.
2. Under Organization, select **Manage Technicians**.
3. Select **Role**.
4. Click on the **edit** option to edit/grant permission to conduct remote support and/or unattended access to a custom role.

The screenshot displays the 'Manage Technicians' page in the Zoho Assist settings. The left sidebar contains navigation options: Search, Organization, General, Remote support, Unattended Access, Security & Compliance, and Integrations. The main content area is titled 'Manage Technicians' and features two tabs: 'Users' and 'Role(s)'. Below the tabs, it indicates 'Total: 4' roles and includes a 'New Role' button. A table lists the roles with columns for Role, Description, Created by, and Actions. The 'Remote Support Technician' role is highlighted, and its edit icon (pencil) is circled in red.

Role	Description	Created by	Actions
Super Admin	An administrator with access to all privileges.	-	View, Copy
Admin	An administrator with access to all privileges except that of Rebranding, Two-factor authentication, and Subscription.	-	View, Copy
Technician	A user with access to conduct Remote Support, Unattended Access, and Screen Sharing sessions.	-	View, Copy
Remote Support Technician	Remote Support Technician who can conduct Remote Support sessions alone	malcom@zylker.com On Jul 26, 2022 2:40 PM	View, Copy, Edit , Delete

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

To define unattended group permissions to technicians

1. Go to **Settings** in the top Menu bar.
2. Under **Organization**, select **Manage Technicians**.
3. Under **Departments & Groups**, click **All** (By default, all groups will be selected).

Manage Technicians

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Unattended Access: 5 / Unlimited Technician(s) [UPGRADE PLAN]

Status: All | Role: All [INVITE TECHNICIAN]

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lisa@zylker.com	Technician	1 Department & 4 Groups
jonathan@zylker.com	Technician - External	1 Department & 1 Groups

4. Select the necessary groups and click **DONE**.

Departments & Groups

1/6 Departments selected. [DONE]

Search

My Department All Groups selected.

Groups Automate Permissions

Development team

QA Team

Marketing grp

Location A

Sales Team

Marketing dpt

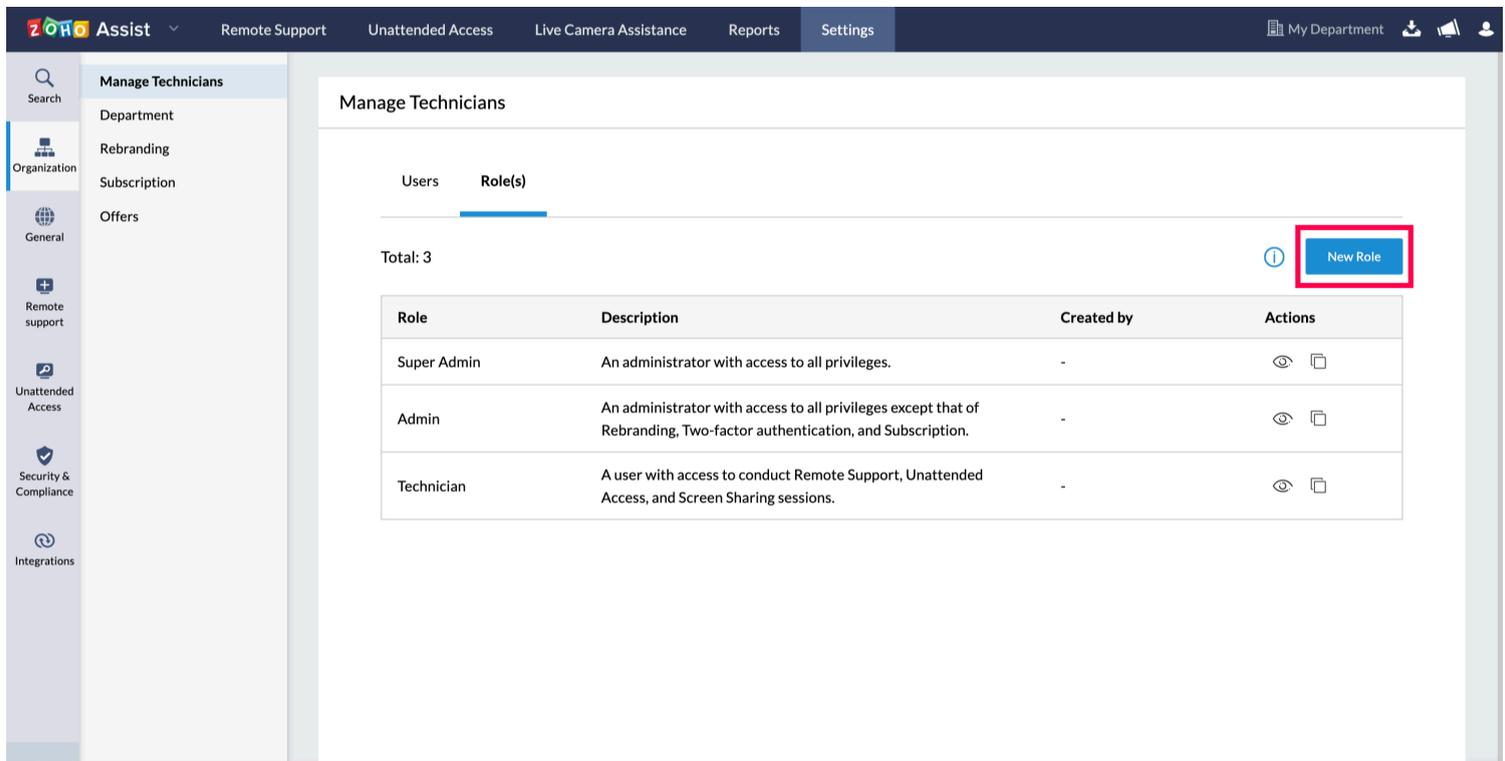
Debugging dpt

Marketing

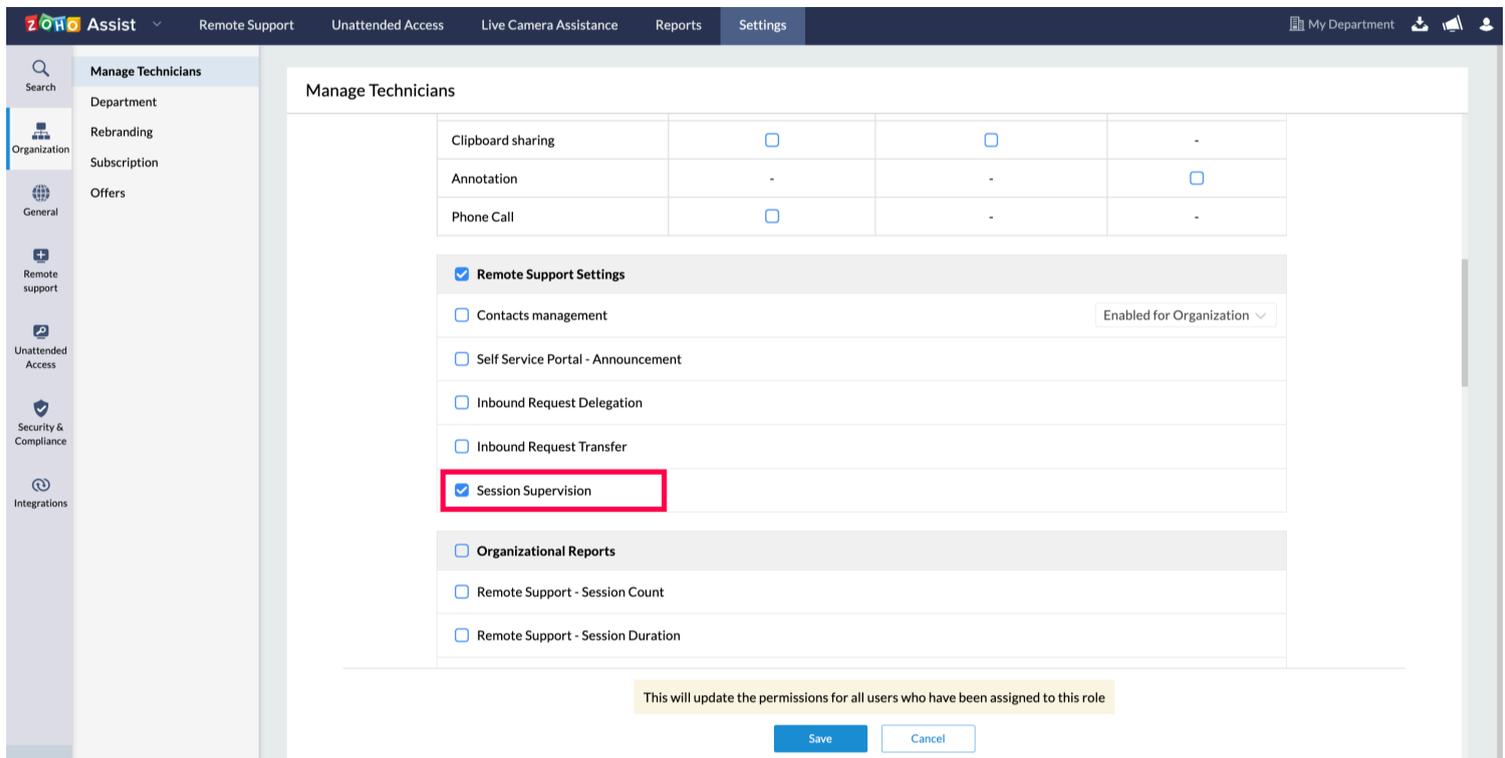
To assign session supervision access to a role

With Session Supervision in Assist, sessions can be monitored if the technician has access to the feature. The technician can monitor the scheduled or ongoing session in view-only mode.

1. Select **Role(s)** and click **New Role** to add a new role.



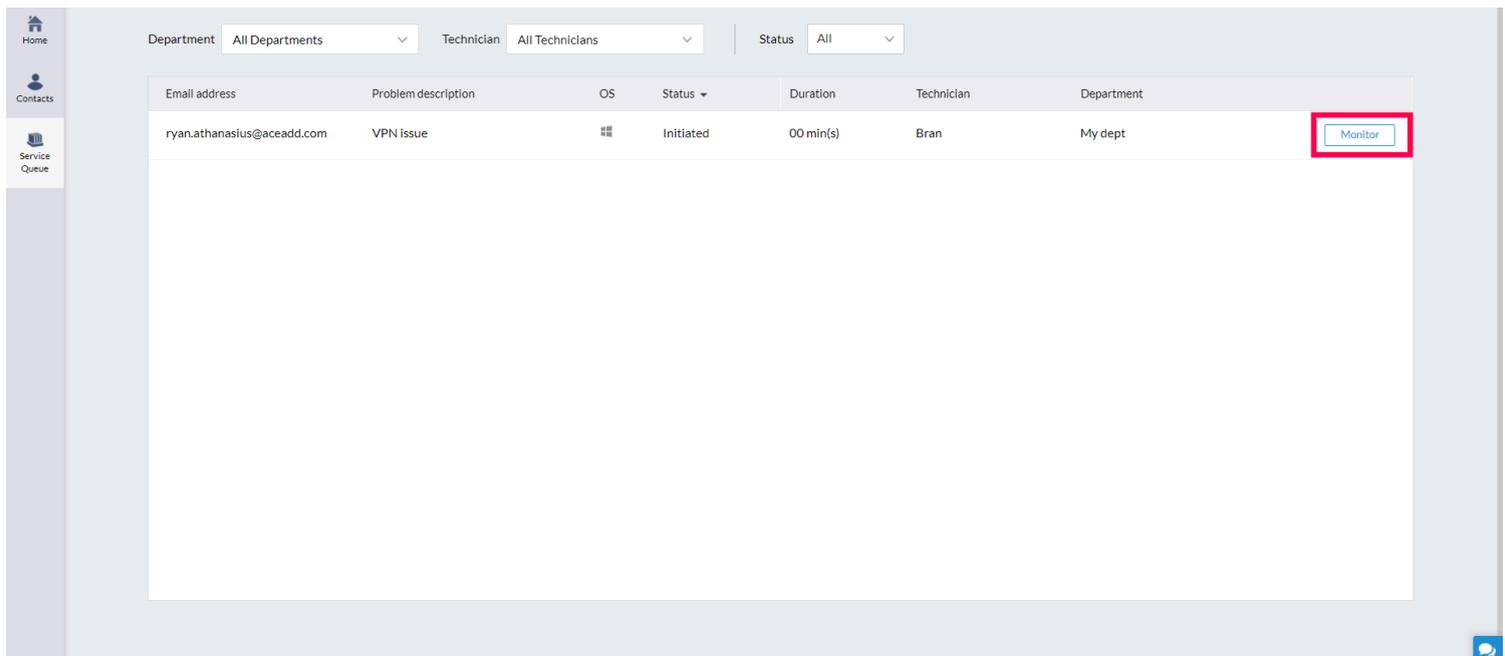
2. Enter the role name and description and select **Session Supervision** in the Permission field to assign supervision access to the role. Then, click **Save**.



To start monitoring a remote session

1. Log in to your Zoho Assist account and go to **Remote Support**.

2. Select **Monitor** to start supervising a remote session in view - only mode.



The screenshot shows the Zoho Assist interface with a table of remote sessions. The table has the following columns: Email address, Problem description, OS, Status, Duration, Technician, and Department. The first row contains the following data: Email address: ryan.athanasius@aceadd.com, Problem description: VPN issue, OS: Windows, Status: Initiated, Duration: 00 min(s), Technician: Bran, and Department: My dept. A red box highlights the 'Monitor' button located at the end of the first row.

Email address	Problem description	OS	Status	Duration	Technician	Department	Monitor
ryan.athanasius@aceadd.com	VPN issue	Windows	Initiated	00 min(s)	Bran	My dept	Monitor

Note:

- You cannot create or select unattended computer groups in Free Plan.
- The Super Admin can choose to receive notifications through email on changes made by the Admin by enabling **Notify me on technician management alerts** under **Settings > Preferences**.