The steps required to begin working with Customer Monitor:

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

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

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

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

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

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

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

- Work with helpdesk Customer Desk
- Manual hardware evidence

After fulfilling step 6, the system is ready for :

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

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

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

Procedures of the settings and descriptions of other functions are listed in other articles of How CM works **[11].**
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11/04/2012

Links
[1] https://www.customermonitor.eu/i-am-interested-cm/try-cm
[2] https://www.customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-0
[3] https://www.customermonitor.eu/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/cm-server-installation/initial

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

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

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

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

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

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

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

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