BeyondTrust

Remote Support Autotask Integration

TC:3/4/2024

Table of Contents

BeyondTrust Integration with Autotask

IMPORTANT!

You must purchase this integration separately for both your Remote Support software and your Autotask solution. For more information, contact BeyondTrust's Sales team.

Service desks and customer support organizations using Autotask can integrate with BeyondTrust to improve service levels, centralize support processes, and strengthen compliance. This document describes the installation and configuration of the BeyondTrust Remote Support integration with Autotask.

The Autotask integration with BeyondTrust Remote Support provides the following functionality:

- A BeyondTrust support session can be initiated from within Autotask.
- At the end of a session, the incident can be updated with session information, including a chat transcript, system information, session notes, and customer and representative surveys.

Prerequisites for the BeyondTrust Remote Support Integration with Autotask

To complete this integration, please ensure that you have the necessary software installed and configured as indicated in this guide, accounting for any network considerations.

Applicable Versions

- BeyondTrust Remote Support: 14.x and newer
- Autotask: Current release

Network Considerations

The following network communication channels must be open for the integration to work properly:

Outbound From	Inbound To	TCP Port #	Purpose
BeyondTrust Middleware Engine Server	Autotask	443	API calls from the BeyondTrust Middleware Engine server.
BeyondTrust Middleware Engine Server	BeyondTrust Appliance B Series	443	API calls from the BeyondTrust Middleware Engine server.
BeyondTrust Appliance B Series	BeyondTrust Middleware Engine Server	8180 (default) 443 (optional)	The BeyondTrust Middleware Engine server receives outbound events from the appliance. However, if polling is used instead of outbound events, then this port does not have to be open.

Prerequisite Installation and Configuration

The Autotask integration is a BeyondTrust Middleware Engine plugin.

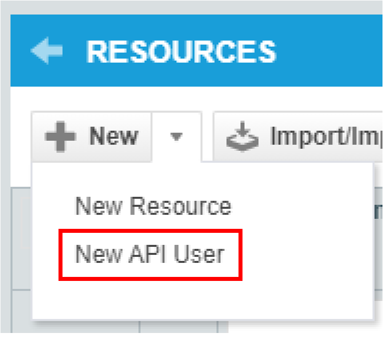
For more information on installing and working with the BeyondTrust Middleware Engine, please see the BeyondTrust Remote Support Middleware Engine Installation and Configuration document at www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine.

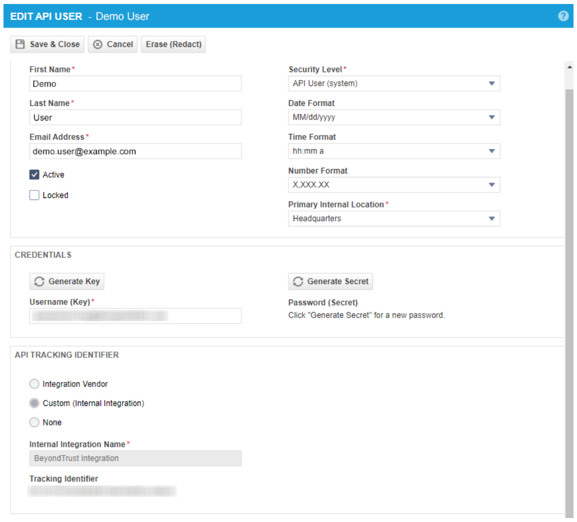
Configure Autotask for Integration with BeyondTrust Remote Support

The following steps describe the creation of an API user as well as the configuration of two LiveLinks in Autotask for generating session keys and launching a Jump session to a Configuration Item.

Create an API User

1. In Autotask, go to **Admin > Resources (Users)**.
2. Hover over the arrow next to the **New** button and click **New API User**.





EDIT API USER - Demo User

First Name* Demo

Last Name* User

Email Address* demo.user@example.com

☑ Active

□ Locked

Security Level* API User (system)

Date Format MM/dd/yyyy

Time Format hh:mm a

Number Format X,XXX.XX

Primary Internal Location* Headquarters

CREDENTIALS

Username (Key)* [redacted]

Password (Secret)
Click "Generate Secret" for a new password.

API TRACKING IDENTIFIER

○ Integration Vendor
● Custom (Internal Integration)
○ None

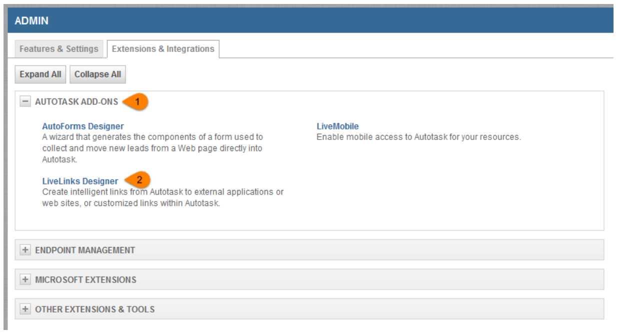
Internal Integration Name* BeyondTrust Integration

Tracking Identifier [redacted]

3. Fill in the required fields:
4. **GENERAL**
    - First Name
    - Last Name
    - Email Address
    - Security Level
    - API User (System)
    - Primary Internal Location
5. **CREDENTIALS**
    - Click **Generate Key** to generate a random key.
    - Click **Generate Secret** to generate a random secret.
6. **API TRACKING IDENTIFIER**
    - Click the **Custom (Internal Integration)** radio button to generate a random tracking identifier.
7. Copy the generated Credentials (key, secret) and API Tracking Identifier which is the API Integration Key needed to add them in the Middleware Engine configuration.

Create BeyondTrust Application

1. In Autotask, go to **Admin > Extensions & Integrations > Autotask Add-ons > LiveLinks Designer**.

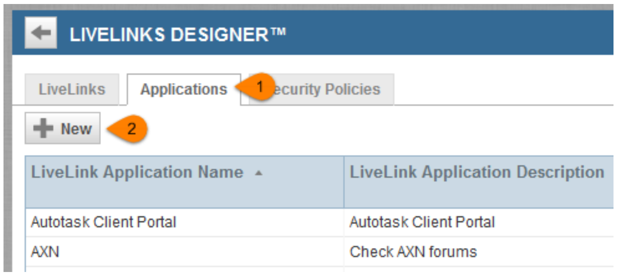


AutoForms Designer
A wizard that generates the components of a form used to collect and move new leads from a Web page directly into Autotask.

LiveLinks Designer
Create intelligent links from Autotask to external applications or web sites, or customized links within Autotask.

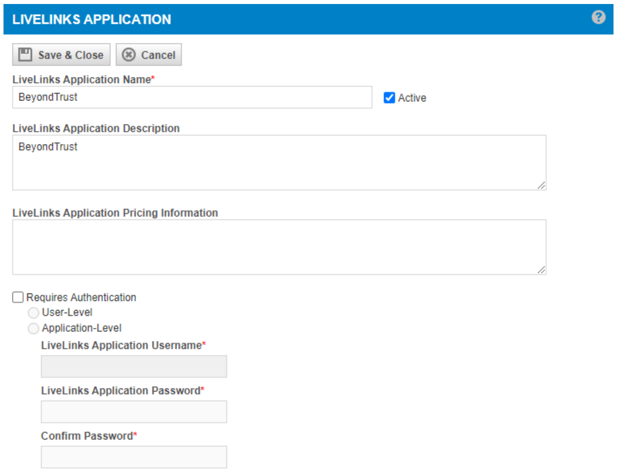
LiveMobile
Enable mobile access to Autotask for your resources.

2. On the **Applications** tab, click the **New** button.



LiveLink Application Name ▲	LiveLink Application Description
Autotask Client Portal	Autotask Client Portal
AXN	Check AXN forums

3. Enter **BeyondTrust** as the **LiveLinks Application Name** and the **LiveLinks Application Description**.
4. Click **Save & Close**.



LiveLinks Application Name*
BeyondTrust ☑ Active

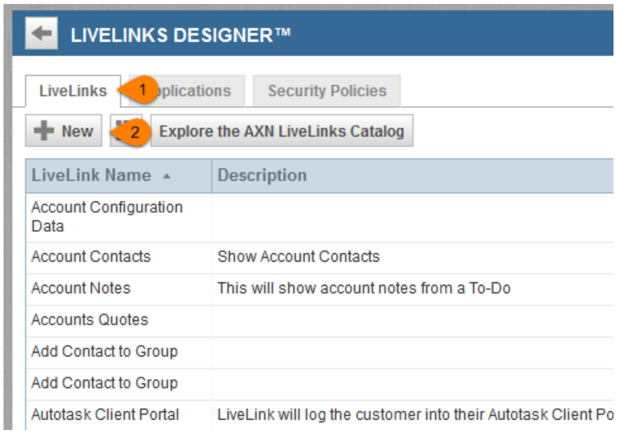
LiveLinks Application Description
BeyondTrust

LiveLinks Application Pricing Information

□ Requires Authentication
○ User-Level
○ Application-Level
LiveLinks Application Username*
LiveLinks Application Password*
Confirm Password*

Create the BeyondTrust Jump LiveLink

1. In Autotask, go to **Admin > Automation > Autoforms & LiveLinks > LiveLinks Designer**.
2. On the **LiveLinks** tab, click the **New** button.

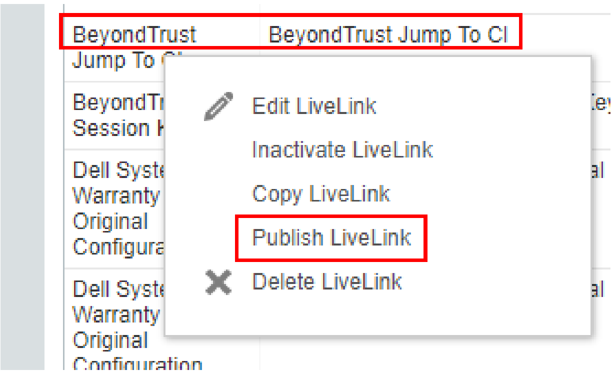


LiveLink Name	Description
Account Configuration Data	
Account Contacts	Show Account Contacts
Account Notes	This will show account notes from a To-Do
Accounts Quotes	
Add Contact to Group	
Add Contact to Group	
Autotask Client Portal	LiveLink will log the customer into their Autotask Client Po

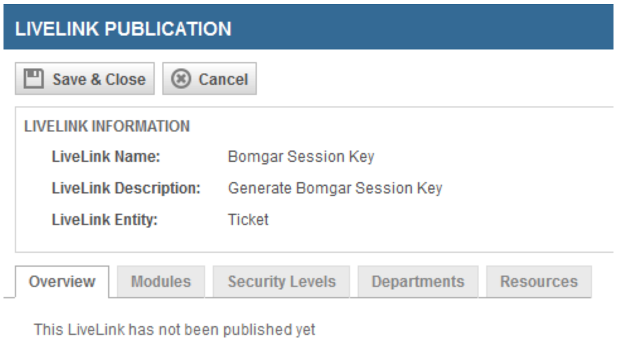
3. Create the LiveLink with the following settings:

Field Name	Field Value
LiveLink Name	BeyondTrust Jump To CI
Label	BeyondTrust Jump To CI
Description	BeyondTrust Jump To CI
Active	[checked]
Category	Service Desk
LiveLink Application Name	BeyondTrust
Entity	Ticket
Base URL	**https://<BeyondTrust-appliance-host>/api/client_script.ns**
Querystring Values	**?type=rep&operation=generate&action=start_pinned_client_session&search_string=<UDF-Device Name(ATG_InstalledProduct)>&session.custom.external_key=<TICKETID>**

4. On the **Configuration** tab, ensure both **Ticket Details Window - Service Desk** and **Ticket Grid - Service Desk** are checked.
5. Click **Save & Close**.
6. Right-click the BeyondTrust Jump to CI LiveLink in the list and select **Publish LiveLink**.



7. Using the **Security Levels**, **Departments**, and/or **Resources** tabs, select the appropriate groups or users that should be able to view and use the LiveLink.
8. Click **Save & Close** to publish the LiveLink.


LIVELINK PUBLICATION

LIVELINK INFORMATION

LiveLink Name: Bomgar Session Key

LiveLink Description: Generate Bomgar Session Key

LiveLink Entity: Ticket

This LiveLink has not been published yet

Create the BeyondTrust Session Key LiveLink

1. Create another LiveLink with the following settings:

Field Name	Field Value
LiveLink Name	BeyondTrust Session Key
Label	BeyondTrust Session Key
Description	Generate BeyondTrust Session Key
Active	[checked]
Category	Service Desk
LiveLink Application Name	BeyondTrust
Entity	Ticket
Base URL	**https://<BeyondTrust-appliance-host>/api/client_script.ns**
Querystring Values	**?type=rep&operation=generate&action=generate_session_key&session.custom.external_key=<TICKETID>**

2. On the **Configuration** tab, ensure both **Ticket Details Window - Service Desk** and **Ticket Grid - Service Desk** are checked.
3. Click **Save and Close**.
4. Follow the same steps as with the previous link to select the appropriate groups and users, and then publish the LiveLink.

Configure BeyondTrust Remote Support for Integration with Autotask

Several configuration changes are necessary on the BeyondTrust Appliance B Series to integrate with Autotask. You must make these changes on each appliance for which you intend to create a plugin configuration.

All of the steps in this section take place in the BeyondTrust **/login** administrative interface. Access your Remote Support interface by going to the hostname of your B Series Appliance followed by **/login** (e.g., https://support.example.com/login).

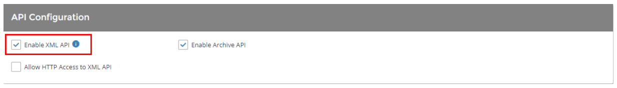
> *For more information on creating a plugin configuration, please see "Configure the Autotask Plugin for Integration with BeyondTrust Remote Support" on page 12.*

Verify the API Is Enabled

Management | API CONFIGURATION

This integration requires the BeyondTrust XML API to be enabled. This feature is used by the BeyondTrust Middleware Engine to communicate with the BeyondTrust APIs.

Go to **/login > Management > API Configuration** and verify that **Enable XML API** is checked.



API Configuration

☑ Enable XML API　☑ Enable Archive API

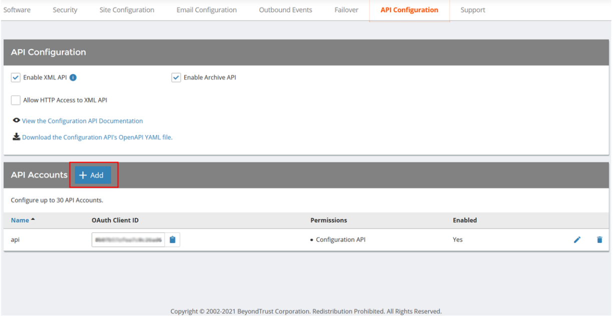
□ Allow HTTP Access to XML API

Create an OAuth API Account

Management | API CONFIGURATION

The Autotask API account is used from within Autotask to make Remote Support Command API calls to Remote Support.

1. In **/login**, navigate to **Management > API Configuration**.
2. Click **Add**.



API Configuration

☑ Enable XML API　☑ Enable Archive API

□ Allow HTTP Access to XML API

View the Configuration API Documentation

Download the Configuration API's OpenAPI YAML file.

API Accounts

Configure up to 30 API Accounts.

Name	OAuth Client ID	Permissions	Enabled
api	[redacted]	• Configuration API	Yes

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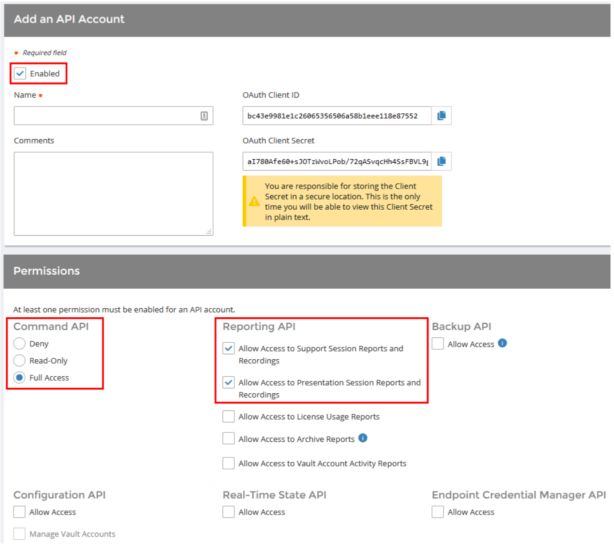
3. Check **Enabled**.
4. Enter a name for the account.
5. **OAuth Client ID** and **OAuth Client Secret** is used during the OAuth configuration step in Autotask.
6. Under **Permissions**, check the following:
    - Command API: **Full Access**.
    - Reporting API: **Allow Access to Support Session Reports and Recordings**, and **Allow Access to Presentation Session Reports and Recordings**.
7. Click **Save** at the top of the page to create the account.



Add an API Account

• *Required field*

☑ Enabled

Name •

OAuth Client ID

bc43e9981e1c26065356506a58b1eee118e87552

Comments

OAuth Client Secret

aI780Afe60+sJOTzWvoLPob/72qASvqcHh4SsFBVL9

You are responsible for storing the Client Secret in a secure location. This is the only time you will be able to view this Client Secret in plain text.

Permissions

At least one permission must be enabled for an API account.

Command API
○ Deny
○ Read-Only
● Full Access

Reporting API
☑ Allow Access to Support Session Reports and Recordings
☑ Allow Access to Presentation Session Reports and Recordings
□ Allow Access to License Usage Reports
□ Allow Access to Archive Reports
□ Allow Access to Vault Account Activity Reports

Backup API
□ Allow Access

Configuration API
□ Allow Access
□ Manage Vault Accounts

Real-Time State API
□ Allow Access

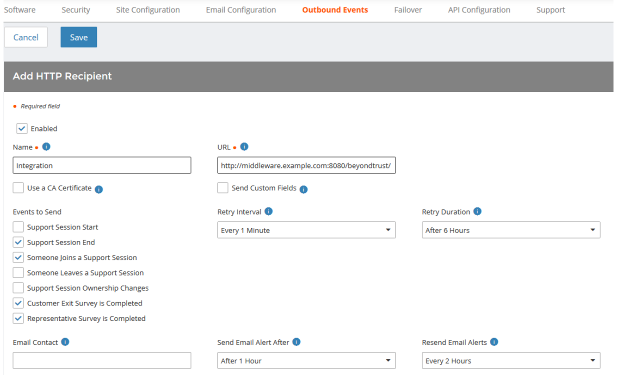
Endpoint Credential Manager API
□ Allow Access

Add an Outbound Event URL

Management

OUTBOUND EVENTS

1. Go to **/login > Management > Outbound Events**.
2. In the HTTP Recipients section, click **Add** and name it **Integration** or something similar.
3. Enter the URL to use:
    - If using an appliance ID of **default**: **http://<middleware-host>:<port>/ ERSPost**. The default port is **8180**.
    - If using an appliance ID other than **default**: **http://<middleware-host>:<port>/ ERSPost?appliance=<appliance-id>** where **<middleware-host>** is the hostname where the BeyondTrust Middleware Engine is installed. The default port is **8180**. The **<appliance-id>** is an arbitrary name, but note the value used, as it is entered later in the plugin configuration. This name accepts only alphanumeric values, periods, and underscores.
4. Scroll to **Events to Send** and check the following events:
    - **Support Session End**
    - **Customer Exit Survey is Completed**
    - **Representative Survey is Completed**
    - **Someone Joins a Support Session** (Optional)
5. Click **Save**.



Add HTTP Recipient

• *Required field*

☑ Enabled

Name •

Integration

URL •

http://middleware.example.com:8080/beyondtrust/

□ Use a CA Certificate

□ Send Custom Fields

Events to Send
□ Support Session Start
☑ Support Session End
☑ Someone Joins a Support Session
□ Someone Leaves a Support Session
□ Support Session Ownership Changes
☑ Customer Exit Survey is Completed
☑ Representative Survey is Completed

Retry Interval

Every 1 Minute

Retry Duration

After 6 Hours

Email Contact

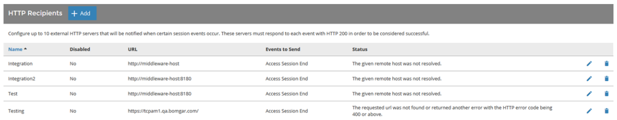
Send Email Alert After

After 1 Hour

Resend Email Alerts

Every 2 Hours

6. The list of outbound events contains the event just added. The **Status** column displays a value of **OK** if communication is working. If communication is not working, the **Status** column displays an error which you can use to repair communication.



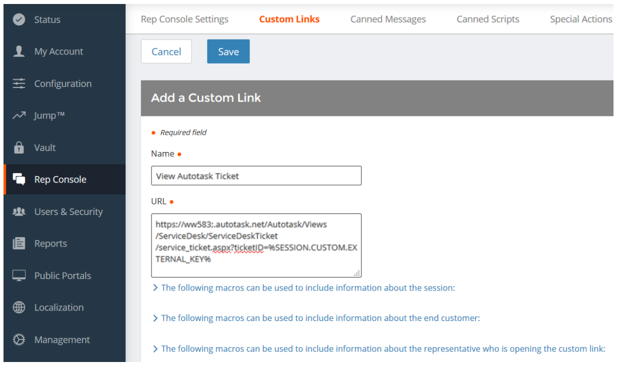
Configure up to 10 external HTTP servers that will be notified when certain session events occur. These servers must respond to each event with HTTP 200 in order to be considered successful.

Name ▲	Disabled	URL	Events to Send	Status
Integration	No	http://middleware-host	Access Session End	The given remote host was not resolved.
Integration2	No	http://middleware-host:8180	Access Session End	The given remote host was not resolved.
Test	No	http://middleware-host:8180	Access Session End	The given remote host was not resolved.
Testing	No	https://tcpam1.qa.bomgar.com/	Access Session End	The requested url was not found or returned another error with the HTTP error code being 400 or above.

Add a Custom Link

BeyondTrust custom links can be configured to allow representatives to quickly access the Autotask item that is associated with the session.

BeyondTrust 15.1 and later



● *Required field*

Name ●

View Autotask Ticket

URL ●

https://ww583;.autotask.net/Autotask/Views/ServiceDesk/ServiceDeskTicket/service_ticket.aspx?ticketID=%SESSION.CUSTOM.EXTERNAL_KEY%

> The following macros can be used to include information about the session:

> The following macros can be used to include information about the end customer:

> The following macros can be used to include information about the representative who is opening the custom link:

1. Browse to **Rep Console > Custom Links**.
2. Enter a name for the link, and then set the URL to: **https://ww<#>.autotask.net/Autotask/Views/ServiceDesk/ServiceDeskTicket/service_ticket.aspx?ticketID=%SESSION.CUSTOM.EXTERNAL_KEY%** where **<#>** is the customer's Autotask instance number. If needed, you can use any of the available macros to customize the link according to your specifications.
3. Click **Save** to save the new link.

Configure the Autotask Plugin for Integration with BeyondTrust Remote Support

Now that you have configured Autotask and the BeyondTrust Appliance B Series, deploy and configure the Autotask plugin.

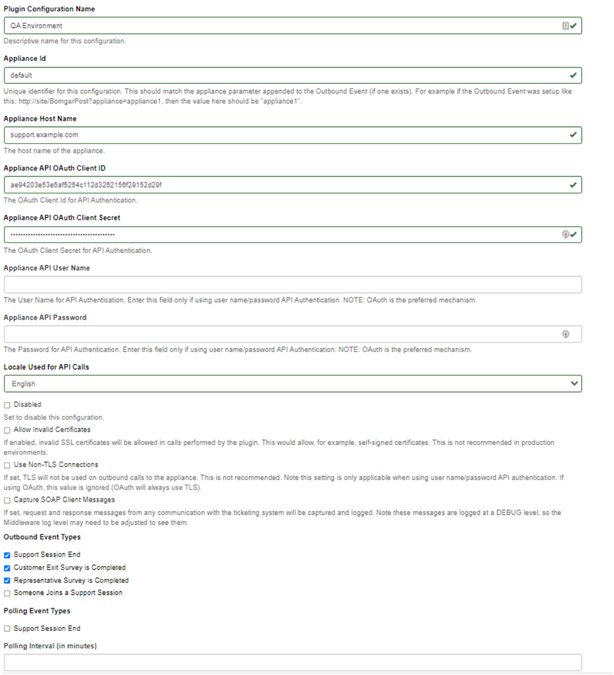
1. Copy the provided plugin ZIP file to the server hosting the BeyondTrust Middleware Engine.
2. Extract the plugin ZIP file to the **Plugins** folder in the directory where the BeyondTrust Middleware Engine is installed.
3. Restart the BeyondTrust Middleware Engine Windows service.
4. From the server, launch the middleware administration tool. The default URL is http://127.0.0.1:53231.
5. The **Autotask Plugin** shows in the list of plugins. Click the clipboard icon to add a new configuration.

> *For more information on installing and working with the BeyondTrust Middleware Engine, please see the BeyondTrust Remote Support Middleware Engine Installation and Configuration document at www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine.*

BeyondTrust Appliance B Series

The first portion of the plugin configuration provides the necessary settings for communication between the plugin and the B Series Appliance. The configuration sections include:

1. **Plugin Configuration Name:** Any desired value. Because multiple configurations can be created for a single plugin, allowing different environments to be targeted, provide a descriptive name to indicate how this plugin is to be used.
2. **Appliance Id:** This can be left as **Default** or can be given a custom name. This value must match the value configured on the outbound event URL in the B Series Appliance. If outbound events are not being used, this value is still required, but any value may be used.
3. **BeyondTrust Appliance B Series Host Name:** The hostname of the B Series Appliance. Do not include **https://** or other URL elements.
4. **BeyondTrust Integration API OAuth Client ID**: The client ID of the OAuth account.
5. **BeyondTrust Integration API OAuth Client Secret:** The client secret of the OAuth account.
6. **Locale Used for BeyondTrust API Calls:** This value directs the B Series Appliance to return session data in the specified language.
7. **Disabled:** Enable or disable this plugin configuration.
8. **Allow Invalid Certificates:** Leave unchecked unless there is a specific need to allow. If enabled, invalid SSL certificates are allowed in calls performed by the plugin. This would allow, for example, self-signed certificates. We do not recommend this in production environments.



Plugin Configuration Name

QA Environment ✓

Descriptive name for this configuration.

Appliance Id

default ✓

Unique identifier for this configuration. This should match the appliance parameter appended to the Outbound Event (if one exists). For example if the Outbound Event was setup like this: http://site/BomgarPost?appliance=appliance1, then the value here should be "appliance1".

Appliance Host Name

support.example.com ✓

The host name of the appliance.

Appliance API OAuth Client ID

ae94203e53e5af5264c112d3262156f29152d29f ✓

The OAuth Client Id for API Authentication.

Appliance API OAuth Client Secret

•• ✓

The OAuth Client Secret for API Authentication.

Appliance API User Name

The User Name for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanism.

Appliance API Password

The Password for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanism.

Locale Used for API Calls

English

☐ Disabled

Set to disable this configuration.

☐ Allow Invalid Certificates

If enabled, invalid SSL certificates will be allowed in calls performed by the plugin. This would allow, for example, self-signed certificates. This is not recommended in production environments.

☐ Use Non-TLS Connections

If set, TLS will not be used on outbound calls to the appliance. This is not recommended. Note this setting is only applicable when using user name/password API authentication. If using OAuth, this value is ignored (OAuth will always use TLS).

☐ Capture SOAP Client Messages

If set, request and response messages from any communication with the ticketing system will be captured and logged. Note these messages are logged at a DEBUG level, so the Middleware log level may need to be adjusted to see them.

Outbound Event Types

☑ Support Session End
☑ Customer Exit Survey is Completed
☑ Representative Survey is Completed
☐ Someone Joins a Support Session

Polling Event Types

☐ Support Session End

Polling Interval (in minutes)

9. **Use Non-TLS Connections:** Leave unchecked unless it is the specific goal to use non-secure connections to the B Series Appliance. If checked, TLS communication is disabled altogether. If non-TLS connections are allowed, HTTP access must be enabled on the BeyondTrust **/login > Management > API Configuration** page. We strongly discourage using non-secure connections.

> ***Note:*** *When using OAuth authentication, TLS cannot be disabled.*

10. **Outbound Events Types:** Specify which events the plugin processes when received by the middleware engine. Keep in mind that any event types selected here must also be configured to be sent in BeyondTrust. The Middleware Engine receives any events configured to be sent in BeyondTrust but passes them off to the plugin only if the corresponding event type is selected in this section.
    - **Support Session End**
    - **Customer Exit Survey is Completed**
    - **Representative Survey is Completed**
11. **Polling Event Types:** If network constraints limit connectivity between the B Series Appliance and the middleware engine such that outbound events cannot be used, an alternative is to use polling. The middleware engine regularly polls the B Series Appliance for any sessions that have ended since the last session was processed. At this time, only the **Support Session End** event type is supported.

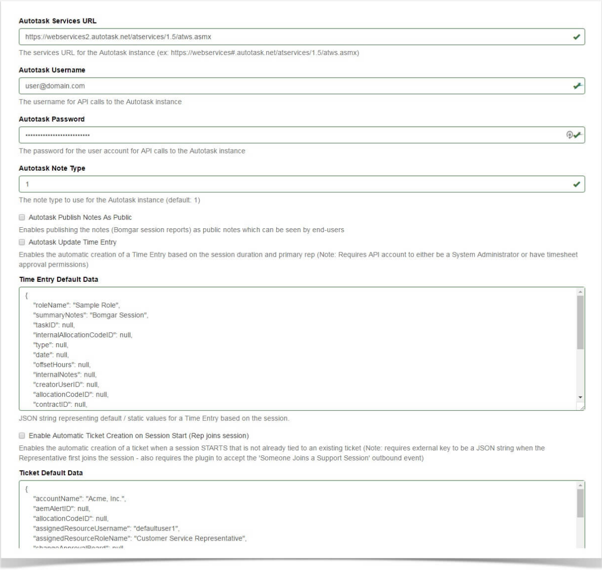
> ***Note:*** *One caveat to polling behavior versus the use of outbound events is that if a session has ended but the customer exit survey has not yet been submitted within the same polling interval, the customer exit survey is not processed. This does not apply to representative surveys since the session is not considered to be complete if a representative survey is still pending.*

12. **Polling Interval:** Enter only if polling is used. This determines how often the middleware engine polls the B Series Appliance for sessions that have ended.
13. **Retry Attempt Limit:** Enter the number of retries that can be attempted if the plugin fails to process an event.
14. **Retry Outbound Event Types:** Specify which outbound events the plugin retries if it fails to process an event.
15. **Retry Polling Event Types:** Specify which polling events the plugin retries if it fails to process an event.

Autotask Instance

The remainder of the plugin configuration provides the necessary settings for communication between the plugin and the Autotask instance. The configuration settings include:

1. **Autotask Services URL:** The services URL for the Autotask instance (e.g., **https://webservices<#>.autotask.net/ATServicesRest**, where **#** is the same number found in the URL used to access the Autotask web interface (e.g., **https://ww<#>.autotask.net**).



Autotask Services URL

https://webservices2.autotask.net/atservices/1.5/atws.asmx ✓

The services URL for the Autotask instance (ex: https://webservices#.autotask.net/atservices/1.5/atws.asmx)

Autotask Username

user@domain.com ✓

The username for API calls to the Autotask instance

Autotask Password

•••••••••••••••••••••••••• ✓

The password for the user account for API calls to the Autotask instance

Autotask Note Type

1 ✓

The note type to use for the Autotask instance (default: 1)

☐ Autotask Publish Notes As Public

Enables publishing the notes (Bomgar session reports) as public notes which can be seen by end-users

☐ Autotask Update Time Entry

Enables the automatic creation of a Time Entry based on the session duration and primary rep (Note: Requires API account to either be a System Administrator or have timesheet approval permissions)

Time Entry Default Data

```
{
   "roleName": "Sample Role",
   "summaryNotes": "Bomgar Session",
   "taskID": null,
   "internalAllocationCodeID": null,
   "type": null,
   "date": null,
   "offsetHours": null,
   "internalNotes": null,
   "creatorUserID": null,
   "allocationCodeID": null,
   "contractID": null,
```

JSON string representing default / static values for a Time Entry based on the session.

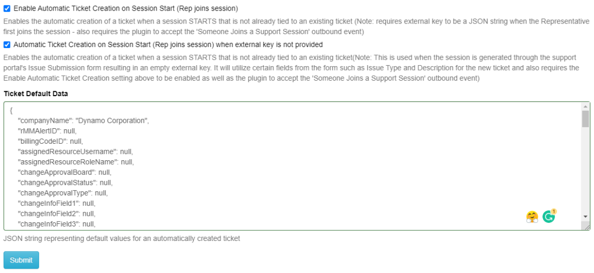
☐ Enable Automatic Ticket Creation on Session Start (Rep joins session)

Enables the automatic creation of a ticket when a session STARTS that is not already tied to an existing ticket (Note: requires external key to be a JSON string when the Representative first joins the session - also requires the plugin to accept the 'Someone Joins a Support Session' outbound event)

Ticket Default Data

```
{
   "accountName": "Acme, Inc.",
   "aemAlertID": null,
   "allocationCodeID": null,
   "assignedResourceUsername": "defaultuser1",
   "assignedResourceRoleName": "Customer Service Representative",
```

2. **Autotask Username:** The username of the API account.
3. **Autotask Password:** The password of the above user.
4. **Autotask Note Type:** The type of note used for BeyondTrust Session information (default value is **1**).
5. **Autotask Update Time Entry:** Choose if you want the integration to create time entries based on the session duration and primary representative.
6. **Autotask Publish Notes as Public:** If enabled, notes are published as public notes, meaning that they can be seen by end-users.
7. **Time Entry Default Data:** Only used if **Autotask Update Time Entry** is enabled. This setting contains a JSON string used to represent default data passed for certain fields when creating the time entry. Most can be left 'null', but a few are required.
   - **defaultDomain:** To identify a user in Autotask which matches the primary representative in the session, the BeyondTrust username is combined with this default domain to construct an email address. The email address should match a user in Autotask.
   - **roleName:** This is a required field for time entry creation. The supplied role name must be a role in which any common BeyondTrust/Autotask users are members.
   - **summaryNotes:** This is also a required field for time entry creation. The value supplied is used for all sessions.
8. **Enable Automatic Ticket Creation on Session Start (Rep joins session):** Enables the automatic creation of a ticket when a session that is not already tied to an existing ticket starts.



☑ Enable Automatic Ticket Creation on Session Start (Rep joins session)

Enables the automatic creation of a ticket when a session STARTS that is not already tied to an existing ticket (Note: requires external key to be a JSON string when the Representative first joins the session - also requires the plugin to accept the 'Someone Joins a Support Session' outbound event)

☑ Automatic Ticket Creation on Session Start (Rep joins session) when external key is not provided

Enables the automatic creation of a ticket when a session STARTS that is not already tied to an existing ticket(Note: This is used when the session is generated through the support portal's Issue Submission form resulting in an empty external key. It will utilize certain fields from the form such as Issue Type and Description for the new ticket and also requires the Enable Automatic Ticket Creation setting above to be enabled as well as the plugin to accept the 'Someone Joins a Support Session' outbound event)

Ticket Default Data

```
{
   "companyName": "Dynamo Corporation",
   "rMMAlertID": null,
   "billingCodeID": null,
   "assignedResourceUsername": null,
   "assignedResourceRoleName": null,
   "changeApprovalBoard": null,
   "changeApprovalStatus": null,
   "changeApprovalType": null,
   "changeInfoField1": null,
   "changeInfoField2": null,
   "changeInfoField3": null,
```

JSON string representing default values for an automatically created ticket

> ***Note:** This setting requires an external key to be formatted in a JSON string when the representative first joins the session and also requires the plugin to accept the **Someone Joins a Support Session** outbound event.*

9. **Automatic Ticket Creation on Session Start (Rep joins session) when external key is not provided:** Enables the automatic creation of a ticket when a session that is not already tied to an existing ticket starts.

> ***Note:** This is used when the session is generated through the support portal's Issue Submission form resulting in an empty external key. It will utilize certain fields from the form such as **Issue Type** and **Description** for the new ticket and also requires the **Enable Automatic Ticket Creation** setting above to be enabled as well as the plugin to accept the **Someone Joins a Support Session** outbound event*

10. **Automatic Ticket Creation for these Session Types:** Select the type(s) of sessions that you wish to result in ticket creation when all other criteria is met.
11. **Ticket Default Data:** This setting should be used only if automatic ticket creation is enabled. This setting contains a JSON string used to represent the default data passed for certain fields when creating a ticket. Any values provided in the external key override the corresponding default value provided here.

After saving the configuration, click the test icon next to the new plugin configuration. No restart is needed.

For more information about Automatic Ticket Creation, please see "Automatic Ticket Creation Dynamic Configuration" on page 15.

Automatic Ticket Creation Dynamic Configuration

Three fields allow for dynamic configuration: **ContactID**, **Title**, and **Description**.

For **ContactID**, a specifically formatted value can be supplied, which instructs the integration to search for an Autotask contact record, based on the value of a custom field present on the session. This field would most likely have been filled out by the user on the **Issue Submission** form of the Remote Support site. If no matching contact can be found, the integration uses the static contact identified by the ID in the **defaultContactID** field configured just below in the JSON code.

Example: *A custom field with a code name of **customer_email** has been added to the Remote Support site, to collect the user's email address. That value is searched against the **emailAddress** attribute in Autotask to find a matching Contact record.*

*The formatted value for **ContactID** is:*

{{emailAddress|customer_email}}

The double curly braces are part of the format and must be included.

The first component within the curly braces is the field/attribute on the Autotask Contact record that is searched for a matching value.

The second component (after the pipe character |) is the code name of the custom field created on the Remote Support site and filled out by the user prior to starting the session.

Title and **Description** allow for some dynamic formatting by allowing an admin to place one or both of the following placeholders anywhere within the strings configured for these fields. The two placeholders are **{{Issue}}** and **{{Details}}**. As with the **ContactID** format, the curly braces must be included. The value for the **Issue** placeholder is pulled from the default **Issue Type** field. The value for the **Details** placeholder is pulled from the default **Describe Your Issue** field.

Example: *A user has selected **VPN Access** as the **Issue Type** on the submission form. The issue type can be appended to the ticket title, to create the ticket title **BeyondTrust Remote Support Chat: VPN Access**.*

*The formatted value for **Title** is:*

"title": "BeyondTrust Remote Support Chat: {{Issue}}"

Report Templates

On the BeyondTrust Middleware Engine server, in the **<install dir>\Plugins\<integration>\Templates** folder, there are multiple files ending with ***.hbs**. These are Handlebars template files. These files are used by the plugin to format the session report and exit surveys that are added to the corresponding ticket each time a BeyondTrust session ends or each time a survey is submitted. The templates can be edited if desired.

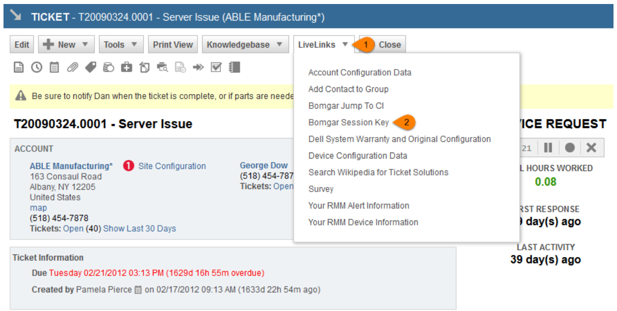
Note: *If you are editing a template, we recommend copying and saving the original in case the changes need to be reverted.*

ℹ *For more information on Handlebars templates, please see the Handlebars website at handlebarsjs.com.*

Use Cases for the Autotask Integration with BeyondTrust Remote Support

Generate Session Key

Support staff can generate a session key that can be given to the end user over the phone or via email to initiate a support session that is automatically associated with the selected ticket.


TICKET - T20090324.0001 - Server Issue (ABLE Manufacturing*)
Edit
New
Tools
Print View
Knowledgebase
LiveLinks
1
Close
Account Configuration Data
Add Contact to Group
Bomgar Jump To CI
Bomgar Session Key
2
Dell System Warranty and Original Configuration
Device Configuration Data
Search Wikipedia for Ticket Solutions
Survey
Your RMM Alert Information
Your RMM Device Information

Be sure to notify Dan when the ticket is complete, or if parts are neede

T20090324.0001 - Server Issue

ACCOUNT

ABLE Manufacturing* Site Configuration
163 Consaul Road
Albany, NY 12205
United States
map
(518) 454-7878
Tickets: Open (40) Show Last 30 Days

George Dow
(518) 454-787
Tickets: Open

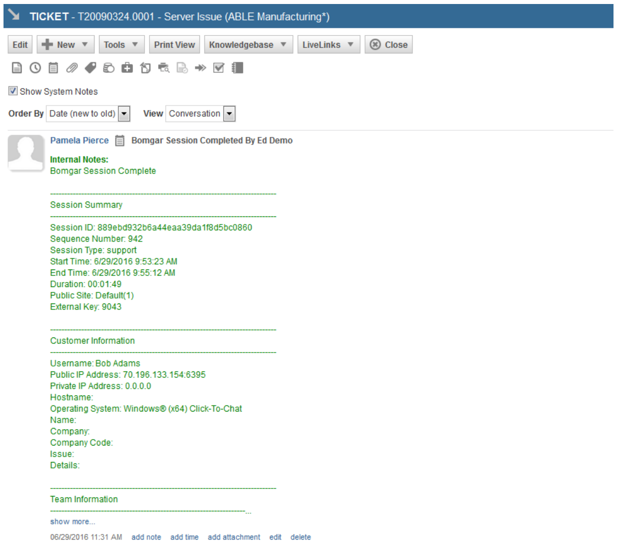
ICE REQUEST
21
L HOURS WORKED
0.08
RST RESPONSE
day(s) ago
LAST ACTIVITY
39 day(s) ago

Ticket Information
Due Tuesday 02/21/2012 03:13 PM (1629d 16h 55m overdue)
Created by Pamela Pierce on 02/17/2012 09:13 AM (1633d 22h 54m ago)

Import BeyondTrust Session Data into Ticket

Once the session ends, the ticket is automatically updated with information gathered during the session, including:

- **Chat Transcript** (including files transferred, special actions, and other events)
- **System Information** (the General section plus other select details such as disk, memory, and network)
- **Session Notes**
- **Surveys** (customer and representative)


TICKET - T20090324.0001 - Server Issue (ABLE Manufacturing*)
Edit
New
Tools
Print View
Knowledgebase
LiveLinks
Close

☑ Show System Notes

Order By Date (new to old) View Conversation

Pamela Pierce Bomgar Session Completed By Ed Demo

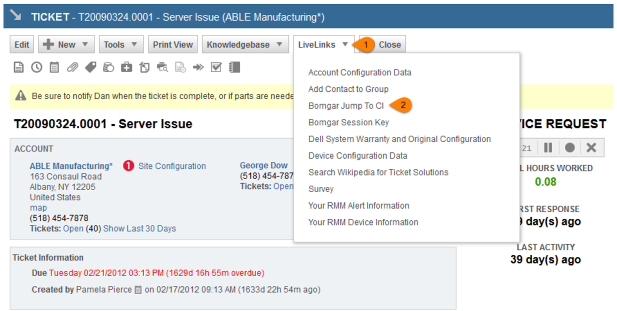
```
Internal Notes:
Bomgar Session Complete

--------------------------------------------------------------------------------
Session Summary
--------------------------------------------------------------------------------
Session ID: 889ebd932b6a44eaa39da1f8d5bc0860
Sequence Number: 942
Session Type: support
Start Time: 6/29/2016 9:53:23 AM
End Time: 6/29/2016 9:55:12 AM
Duration: 00:01:49
Public Site: Default(1)
External Key: 9043

--------------------------------------------------------------------------------
Customer Information
--------------------------------------------------------------------------------
Username: Bob Adams
Public IP Address: 70.196.133.154:6395
Private IP Address: 0.0.0.0
Hostname:
Operating System: Windows® (x64) Click-To-Chat
Name:
Company:
Company Code:
Issue:
Details:

--------------------------------------------------------------------------------
Team Information
---------------------------------------------------------------------------...
```

show more...

06/29/2016 11:31 AM add note add time add attachment edit delete

Jump to Configuration Item

Support staff can leverage BeyondTrust Jump Technology to access a configuration item associated with a ticket directly from the Autotask ticket.


Edit
New
Tools
Print View
Knowledgebase
LiveLinks
1
Close
Account Configuration Data
Add Contact to Group
Bomgar Jump To CI
2
Bomgar Session Key
Dell System Warranty and Original Configuration
Device Configuration Data
Search Wikipedia for Ticket Solutions
Survey
Your RMM Alert Information
Your RMM Device Information

TICKET - T20090324.0001 - Server Issue (ABLE Manufacturing*)

Be sure to notify Dan when the ticket is complete, or if parts are neede

T20090324.0001 - Server Issue

ACCOUNT

ABLE Manufacturing* Site Configuration
163 Consaul Road
Albany, NY 12205
United States
map
(518) 454-7878
Tickets: Open (40) Show Last 30 Days

George Dow
(518) 454-787
Tickets: Open

ICE REQUEST

L HOURS WORKED
0.08

RST RESPONSE
) day(s) ago

LAST ACTIVITY
39 day(s) ago

Ticket Information

Due Tuesday 02/21/2012 03:13 PM (1629d 16h 55m overdue)

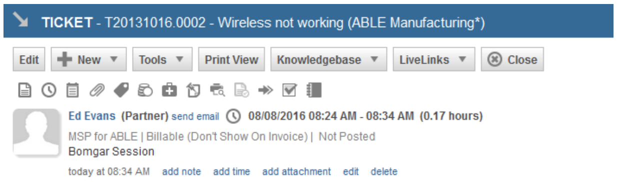
Created by Pamela Pierce on 02/17/2012 09:13 AM (1633d 22h 54m ago)

Access Ticket from Representative Console

Using BeyondTrust's custom links ability, a representative can access the associated ticket directly from within the representative console. This saves time searching for the ticket in Autotask and provides the representative with any issue details, history, or other context to help quickly resolve the issue.

Auto-Time Entry Creation

If desired, a time entry can be created and added to the associated ticket once a session ends. The time entry uses the same start and end time as the actual session for accurate time tracking, as well as associating it with the primary representative from the session.



TICKET - T20131016.0002 - Wireless not working (ABLE Manufacturing*)

Ed Evans (Partner) send email 08/08/2016 08:24 AM - 08:34 AM (0.17 hours)
MSP for ABLE | Billable (Don't Show On Invoice) | Not Posted
Bomgar Session
today at 08:34 AM

Automatic Ticket Creation

The automatic ticket creation feature does require a services engagement to implement for each customer. However, the fact that this functionality is even possible without a large custom development effort can be of great benefit to simplifying workflows and reducing the number of clicks necessary for a support representative.