BeyondTrust

Remote Support BMC Remedy Integration

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depository institution. It is not authorized to accept deposits or trust accounts and is not licensed or regulated by any state or federal banking authority.

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BeyondTrust Integration with BMC Remedy



IMPORTANT!

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

Service desks and customer support organizations using BMC Remedy 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 BMC Remedy.

The BMC Remedy integration with BeyondTrust Remote Support provides the following functionality:

- · A BeyondTrust support session can be initiated from the context of a BMC Remedy ticket.
- A BeyondTrust Jump session can be initiated to a computer system Configuration Item associated with a ticket.
- At the end of a session, the incident can be updated with the session information.

Prerequisites for the BeyondTrust Remote Support Integration with BMC Remedy

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
- BMC Remedy: 8.x and newer

Network Considerations

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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	BMC Remedy	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 B Series Appliance. However, if polling is used instead of outbound events, then this port does not have to be open.

Prerequisite Installation and Configuration

The BMC Remedy integration is a BeyondTrust Middleware Engine plugin.

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

Configure BMC Remedy for Integration with BeyondTrust Remote Support

Integration between BMC Remedy and BeyondTrust Remote Support requires importing a collection of custom objects into the BMC Remedy environment. These include Filters, Active Links, Web Services, etc. The following steps outline this import and configuration process.

Initially, some manual steps must be taken before the bulk of the AR System items can be imported.

Import Forms

- 1. Open BMC Remedy Developer Studio.
- 2. From the main menu, select File > Import.
- 3. Expand BMC Remedy Developer Studio.
- 4. Select Object Definitions and click Next.
- 5. Select the appropriate server and click Next.
- 6. Select the **bomgar_Remedy_Int_With_Incident_Vx.x.xmI** file from the appropriate location and click **Next**.
- 7. From the XML file, add the following forms, removing all other items:
 - COL:BGR:SessionDetail:Staging
 - COL:BGR:Configuration:Params
 - COL:BGR:Form:Setup_Template
- 8. Select the following options:
 - · Replace Objects on the Destination Server
 - Delete Excess Views
 - Replace Application Owner
 - Handle Conflicting Types: Display Conflict Error
- 9. Click Finish.

Note: The import process may take several minutes to complete. Upon successful completion, the above forms will have been imported into the AR System.

Name	Object Type	Add
COL:BGR:SessionDetail:Staging	Form	Pomovo
E COL:BGR:Configuration:Params	Form	Kentove
COL:BGR:Form:Setup_Template	Form	Remove Al
•		4
Replace Objects on the Destination Serve	r	
Delete Excess Fields		
Delete Excess Views		
Replace Full Text options		
Replace Display Properties		
Replace Application Owner		
	CL' - L E	

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Update Existing Forms - HPD:Help Desk

To save time, it may be a good idea to set the Remedy	type filter text	Form Q • • Q
Administrator preferences (in the Windows > Preferences menu) so that fields are not automatically added to all views. This way, fields are added only to the views to which they are pasted. Also, make sure to back up the Incident Form.	BMC Remedy Developer St Custom Button Bar Default Permissions Form Mid Tier Information Object List View Sartup And Shutdown Syntax Coloring Install/Update	Form Preferences: Add New: Data Fields to All Views Button, Menu and Toolbar Item to All Views Incre, Boes and Text to All Views Table Fields to All Views Table Fields to All Views Banel Fields to All Views Exceptional Method News Keyboard Move Step Size: Input Length Units: Bytes Invalid Characters for Form Name: // Bytes Invalid Characters for Form Name: // Do Not Validate Table Fields When a Form is Opened Add New Form Action Fields in Web View: // Do Not Validate Table Fields When a Form is Opened Add New Form Action Fields in Web View: // Submit Query // Bodify Modify All // Search Bit Query // Results List Restore Defaults // OK Cance

- 2. Also open the newly imported **COL:BGR:Form:Setup_Template**.
- 3. If the Incident form does not already have an overlay, select Forms > Create View Overlay from the menu.
- 4. Add a new Panel with the following properties:
 - ID: 80000001
 - Name: COL_Pnl_BeyondTrust_Sessions
 - Label: Beyond Trust Sessions
 - Visible: False
 - Permission: Public
- 5. Copy and paste the following fields from the Setup_Template form to the new panel on the Incident form.
 - 80000002: COL_Tbl_Session_Summary
 - 80000003: COL_Col_Session_ID
 - 80000004: COL_Col_Start_Time
 - 80000005: COL_Col_End_Time
 - 80000006: COL_Col_Duration
 - 80000007: COL_Col_File_Count
 - 80000008: COL_Col_Representative
 - 80000009: COL_Ctrl_BeyondTrust_Logo
 - 800000010: COL_Char_Support_Session_Details

- BeyondTrust
 - 6. Once complete, the **BeyondTrust Sessions** panel should look similar to the screen shot. Save the form.



Add "Launch BeyondTrust Session Key" Link to Left Navigation

- 1. Add the left navigation **z2NF_LeftNavigation** to the overlay and save it.
- 2. Select the left navigation from the outline window and right-click it.
- 3. Select Edit Menu / Navigation Items.
- 4. In the **Edit** window, expand the **Functions** items to add a new item under this menu.
- 5. Select the Functions menu and click Add Item.
- 6. Once the item is added, select it and edit its properties to match the following:
 - ID: 900370918
 - Name: COL_z2NI_LaunchBomgarSession()
 - Label: Launch BeyondTrust Session Key
 - Visible: True
 - Permission: Public
- 7. Save the Incident form.

Add Display-Only Fields

- 1. Copy the following display-only fields from the **Setup_Template** form to the bottom area of the **Incident** form:
 - 900070914: z2tmp_LaunchURL
 - 900070917: z2tmp_Launch_CI
 - 900270919: z2tmp_SessionURL
- 2. Save the form.





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Add "Launch BeyondTrust Jump Client" Link to Left Navigation

- 1. Select the left navigation from the outline window and right-click it.
- 2. Select Edit Menu / Navigation Items.
- 3. In the Edit window, expand the Functions items to add a new item under this menu.
- 4. Select the Functions menu and click Add Item.
- 5. Once the item is added, select it and edit its properties to match the following:
 - ID: 908970913
 - Name: COL_z2NI_Launch BeyondTrust CI
 - Label: Launch BeyondTrust Jump Client
 - Visible: True
 - Permission: Public
- 6. Save the **Incident** form.

Update Existing Forms - SRS:RequestDetail

- 1. Open the Service Request Console form (SRS:RequestDetail) in SRS User view in Developer Studio.
- 2. Also open the newly imported COL:BGR:Form:Setup_Template (SRM-RQC View).
- 3. If the Service Request form does not already have an overlay, select Forms > Create View Overlay from the menu.
- 4. Copy and paste the following fields from the **Setup_Template** form to the new panel on the **Service Request** form.
 - 800000600: COL_Btn_Get_Support_Now
 - 800000601: COL_VF_Launch_Support_Window
 - 800000602: COL_Char_Mid-Tier_URL
 - 800000603: COL_Char_Incident_Number
- 5. Once complete, the request details should look similar to the screen shot. Save the form.



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Import Remaining Items

Once the manual steps above have been completed, the remainder of the package can be imported.

- 1. From the main menu, select File > Import.
- 2. Expand BMC Remedy Developer Studio.
- 3. Select Object Definitions and click Next.
- 4. Select the appropriate server and click Next.
- 5. Select the bomgar_Remedy_Int_With_Incident_Vx.x.xml file from the appropriate location and click Next.
- 6. Import all objects, making sure to select Replace Objects on the Destination Server.
- 7. Click Finish.

Note: The import process may take several minutes to complete. Upon successful completion, the required forms, workflows, and web services will have been imported into the AR System.

8. Flush the Mid-Tier and browser caches, located at <protocol>://<mid-tier-server>:<port>/arsys/shared/config/config.jsp.

Configure the Integration

- In a browser, open the Configuration Params form (<protocol>://<mid-tier-server>:<port>/arsys/forms/<ARserver-name>/COL:BGR:Configuration:Params).
- Add attribute details for the BeyondTrust Server attribute for both the Launch Session and Launch BeyondTrust Cl (Jump Client) items.
- The Attribute Value should be https://<BeyondTrust-sitehostname>.

Configuration Parameters	
Attribute Name	Bomgar Server 💌
Attribute Value	https://ps-remedy.bomgar.com

Note: Access to the **BeyondTrust Sessions** tab as well as the **Session Key** and **Jump to CI** functions are controlled by users' group memberships. Any user who should have access to these items should be added to a new Group in Remedy named "BeyondTrust Users".

Configure Smart IT for the Integration between BMC Remedy and BeyondTrust Remote Support

If your environment has Smart IT available, there are a few use cases that can be implemented within Smart IT.

Generate BeyondTrust Session Key

- Log in to Smart IT as an admin user (<protocol>://<mid-tierserver>:<port>/ux/smart-it/#/).
- 2. Navigate to Configuration > Screen Configuration.



3. In the Incident View section, select Add/Remove Actions.

Progress ~		0	O Dent
Conterner Nicholas Mah Bales Manager (415) 555-60-65 rs.maheney/ligmal	ioney Leon	Primary Office Office 1018 Bridg, 50 1016 Bruthcale Ave. 594, 101 5 other location	
	Africa		Operational Category
cident Cescription stat and set up new Smartboar son Zenitope. Will need this by orkahep. Is very important that we get th peable.	ECD Interactive V ECD tomorrow for	thisboard is confirmos- an important sales back up as fast as	magan Barrice Category Batabase Development and Managem Tools
Assigned to: Saul Goodman (mail	Support Group: Desktop Support	State 1	uder.

Incident View

C Refresh Metadata

Add/Remove Actions Add/Remove Fields: Customer Card Record Summary Categorization Assignment Additional Info

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- 4. Create a new action with the following settings:
 - Action Type: Client-side URL
 - Supported Platforms: Desktop Web (UC)
 - URL/URL:https://<BeyondTrusthostname>/api/client_script?public_portal_ hostname=<BeyondTrust-public-portalhostname>&type=rep& operation=generate&action=generate_session_ key&session.custom.external_key=[id]
 - Open Behavior: New Browser Window
 - Default Label Text: Generate BeyondTrust Session Key
- 5. Save the action.

Incident View > Add/Remove Actions

Generate Borngar	Session Key	×Dela
Basic Information		
Action Type		
Client-side URL	Provider Action	
Supported Platforms		
Desktop Web (LIC)		
Mobile Platforms (iC	S, Android)	
nttps://remedy.bomg	ar.com/ap/client_s	script/public_portal_nostname=remedy.bomgar.com&type=rep&operation=generate&action=gen
 This held accepts arguin 		
Open Behavior		
New Browser Window	Same Browser	Window
	o Show	
Localized Labels		
Localized Labels		Label lext -

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Leverage Smart Recorder to Create Incidents

BeyondTrust 15.1 and later

- 1. Log in to the BeyondTrust /login interface as an admin user.
- 2. Browse to Rep Console > Custom Links.
- 3. Under Rep Console :: Custom Links, click Create New Custom Link.
- 4. Create a link with the following settings:
 - Name: Create Incident via BMC Smart IT
 - URL:<protocol>://<mid-tier-server>:<port>/ux/smart-it/#/create/smartrecorder?customer=%CUSTOMER.NAME%&desc=%SESSION.DETAILS%
- 5. Click **Add Custom Link** to save the new link.

BeyondTrust 15.0 and earlier

- 1. Log in to the BeyondTrust /login interface as an admin user.
- 2. Browse to Configuration > Options > Representative Console :: Custom Link.
- 3. Set the URL to <protocol>://<mid-tier-server>:<port>/ux/smart-it/#/create/smartrecorder?customer=%CUSTOMER.NAME%&desc=%SESSION.DETAILS%
- 4. Click Save.

Configure BeyondTrust for the BMC Remedy Integration

Several configuration changes are necessary on the B Series Appliance to integrate with BMC Remedy. You must make these changes on each B Series Appliance for which you intend to create a plugin configuration, described in <u>"Configure the BMC Remedy Plugin for</u> Integration with BeyondTrust Remote Support" on page 16.

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).

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.

Cinable XML API	Enable Archive API	

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

Create an OAuth API Account

🔯 Management

API CONFIGURATION

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

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

		_	_	_	_	_	_
API Configu	ration						
Enable XML A	PI 🔕	Enable Archive API					
Allow HTTP A	ccess to XML API						
• View the Conf	iguration API Documentation						
L Download the	Configuration API's OpenAPI YAML	lle.					
API Account	ts + Add						
API Account	API Accounts.						
API Account Configure up to 3 Name *	D API Accounts.	_	Peri	nissions		Enabled	
API Account Configure up to 3 Name * api	ts + Add D API Accounts. OAuth Client ID	8	Peri • Cc	missions		Enabled Yes	,

BeyondTrust

- 3. Check Enabled.
- 4. Enter a name for the account.
- OAuth Client ID and OAuth Client Secret is used during the OAuth configuration step in BMC Remedy.
- 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 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://<middlewarehost>:<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

Software	Security	Site Configuration	Email Configuration	Outbound Events	Failover	API Configuration	Support
Cancel	Save						
Add HT	TP Recipie						
Required I	field						
🖌 Enabl	led						
Name 🔹 🕕			URL • 🕕				
Integration	n		http://middleware.ex	ample.com:8080/beyondtri	ust/		
🗌 Use a 🕻	CA Certificate 🕕		Send Custom Fiel	ds 🌒			
Events to S	end		Retry Interval 🕕		Retr	y Duration 💿	
Suppor	rt Session Start		Every 1 Minute		▼ Afte	ar 6 Hours	•
Suppor	rt Session End						
Someo	one Joins a Suppo	ort Session					
Suppor	rt Session Owne	rshin Changes					
Custon	mer Exit Survey is	Completed					
Repres	sentative Survey	is Completed					
Email Conta	act 🕕		Send Email Alert After	0	Rese	nd Email Alerts 🕕	
			After 1 Hour		▼ Eve	ry 2 Hours	-

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.

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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.

HTTP Recipier	nts + Add					
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 hast was not resolved.	1	
Integration2	No	http://middleware-host/8180	Access Session End	The given remote hast was not resolved.	1	
768	No	https://middleware-host/8180	Access Session End	The given remote hest was not resolved.	1	
Testing	No	https://tcpam1.qa.borngar.com/	Access Session End	The requested or was not found or returned another error with the HTTP error code being	1	

Configure the BMC Remedy Plugin for Integration with BeyondTrust Remote Support

Now that you have configured BMC Remedy and the B Series Appliance, deploy and configure the BMC Remedy plugin.

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

- 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 BMC Remedy Plugin shows in the list of plugins. Click the clipboard icon to add a new configuration.

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:

- 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.
- 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.
- 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.
- 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.
- 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.

QA Environment	E 🗸
Descriptive name for this configuration.	
Appliance Id	
default	*
unique identifier for this configuration. This should match the applance parameter appended to the Outbound Event (if one exists). For example if this: http://site/BomgarPost?applance=applance1, then the value here should be "applance1".	the Outbound Event was setup like
Appliance Host Name	
support.example.com	•
The host name of the appliance.	
Appliance API OAuth Client ID	
ae94203e53e5af5204c112d3202150f29152d29f	
The OAuth Client Id for API Authentication.	
Appliance API OAuth Client Secret	
···	• •
The OAuth Client Secret for API Authentication.	
Appliance API User Name	
Appliance API Oser Name	
Appliance API Password	۹
Appliance API Password The Password for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanic	•
Applance API Password Password GM API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanic Leask Used for API Calls	®
Appliance API Password The Password for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: CAuth is the preferred mechanic cache Used for API Calls English) sm.
Applance API Password [Password for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanic Leads Use for API Catis [Explain] Observed	gan.
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Applance API Password [[Tel: Password for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanic Local Local Context of API Catis [English [9 2m.
Appliance API Passeord Parsword for API Authentication. Enter this field only if using user name/passeord API Authentication. NOTE: OAuth is the preferred mechanic Leads Leads Diabled English. J Mon Mich Centification. See to diable this configuration. J Mon Mich Centification. J Mon Mich Centification.	em.
Applance API Password	en.
Applance AP Password	em. t recommended in production sipassword API authentication. If
Applance API Passeod The Passeod for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanic Seale User for API Case English Onsheld On block Cando biol Conferences Terableh. This Schnedicture Use Benchi SSD: conferences Terableh. This Schnedicture Use Benchi SC Conferences Terableh. This SC conferences Terableh. This SC conferences Terableh. This work is spreed (Auth and Barys user TLB). Casher Dia Conferences Terableh. This work is spreed (Auth and Barys user TLB).	trecommended in production
Applaces API Passed The Passed for API Authentication. Enter this field only if using user name/passed API Authentication. NOTE: Outh is the preferred mechanic Cost User for API Cast English	trecommended in production
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Applaces API Passeod Passeod for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OAuth is the preferred mechanic Equility Equility Equility Equility Equility Equility Equility Equility Equility Available Available Equility Available Available Equility Available Available Available Available Available Available Available Available Available Available Available Available Available	treammended in production aparameted in production aparameted APP suberscator. If aparameted APP suberscator. If
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Applaces API Password The Password for API Authentication. Enter this field only if using user name/password API Authentication. NOTE: OALth is the preferred mechanic Lead Used for API Calls English	the second
Applance API Password The Password for API Authentication. Enter this field only if using user name/password API Authentication. INCTE: Outh is the preferred mechanic Casebited Explain C Passhed Casebited C Advanced Control Contr	en.
Applaces API Password	treconnected in production treconnected in production treconnected in production treconnected API authentication. If proseved API authentication. If proget at a CEBUO level, to the
Applaces API Passeod Applaces API Passeod The Passeod for API Authentication. Enter this field only if using user name/passeod API Authentication. NOTE: Outh is the preferred mechanic Complete Complete	en.

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 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.

BMC Remedy Instance

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

- 1. **BMC Remedy Services URL:** URL of the AR Service for the BMC Remedy instance (e.g., https://remedy.example.com/arsys/services/ARService).
- 2. BMC Remedy Username: The username of the API account.
- 3. BMC Remedy Password: The password of the above user.
- 4. BMC Remedy AR Server: The name of the AR/app server instance.
- 5. Session Reports Storage: Populate the session reports into the BeyondTrust Sessions tab, as a Work Note, or both.

The following settings apply only if Session Reports Storage is set to Work Notes or Both:

- Work Info Source: The default value for the Source field on the Work Note (e.g., Email, Phone, Web, Other, etc.).
- Work Info Type: The default value for the Type field on the Work Note. The name should contain no spaces or other nonalpha characters (e.g., CustomerCommunication, GeneralInformation, IncidentTaskAction, etc.).

- Publish as Public Notes: Specifies whether to publish the notes as public or not.
- Lock Log: Specifies whether to lock the work log or not.

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

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.

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

Use Cases for the BMC Remedy 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.

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-44	Impact*	4-Minor/Localized	-	
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This can be done from within Smart IT.

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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)

To be flexible in meeting varying needs, session data can be displayed within a custom BeyondTrust Sessions tab on the Incident form, added as a Work Note, or both.



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Jump to Configuration Item

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



Click-to-Chat for Self Service Users

Self Service users can open their submitted requests in the SRM Request Entry Console and start a chat support session directly from the BMC Remedy ticket. This allows the user the quickest path to resolution while also providing the representative with the necessary context to assist the user. Sessions can be elevated to full support sessions if enabled and when necessary.



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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 BMC Remedy and provides the representative with any available \issue details, history,

or other context to help quickly resolve the issue.

Create Ticket via Smart IT

Using the Smart Recorder in Smart IT for BMC Remedy and BeyondTrust's custom links, a ticket can be created from within the representative console with a single click when the representative is in session. The customer name and issue description from the BeyondTrust session are automatically passed into the new ticket. If available, this can save time and unnecessary clicks for support staff.

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