Remote Support
Ivanti Service Manager

TC:3/4/2024

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BeyondTrust Remote Support Integration with Ivanti Service Manager

IMPORTANT!

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

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

The integration between Ivanti and BeyondTrust Remote Support enables service desk technicians to launch a secure remote support session directly from within Ivanti.

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

- A self-service user can start a BeyondTrust click-to-chat session directly from an incident within Ivanti.
- A representative can generate a session key directly from an incident, change, or service request.
- Details of all BeyondTrust sessions initiated from an incident, change, or service request context are linked to the associated item and are viewable as a list as well as in a detailed view on each item type.
- While in a BeyondTrust session linked to a Ivanti item, a custom link in the BeyondTrust representative console allows a representative to launch a browser window directly to the Ivanti item in order to view additional information.
- A BeyondTrust Jump session can be initiated to access a configuration item from an incident, with the Jump session details being linked to the incident.
- If a session originates outside the normal Ivanti workflow, with a ticket for the incident already existing in Ivanti, the representative can manually link the session to the Ivanti ticket to ensure all details are captured in the Ivanti system.
- With assistance from BeyondTrust Professional Services, the integration can automatically generate incidents in Ivanti when a session is received, thus saving a number of steps for the support representative.

Prerequisites for the BeyondTrust Remote Support Integration with Ivanti Service Manager

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: 18.1 and newer
- Ivanti Service Manager (formerly HEAT Software): 2015.2 and newer (includes cloud and on-premises releases)

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	Ivanti Service Manager	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 Ivanti Service Manager 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 Ivanti Service Manager for Integration with BeyondTrust Remote Support

> ***Note:*** *Before importing the package, use a text editor to ensure all URLs to the B Series Appliance have been updated. To do so, search for* ***support.example.com*** *and replace any instances with the hostname of the B Series Appliance.*

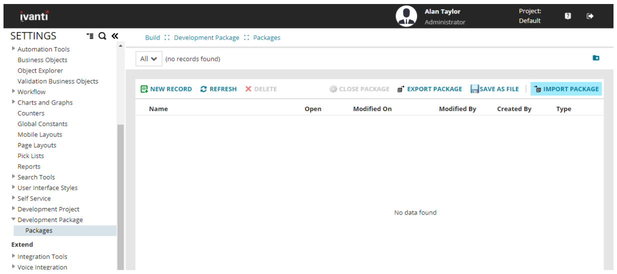
A development package is provided as part of the integration: **BeyondTrust Standard Integration - Core - 1.x.x.MetadataPatch**.

> **IMPORTANT!**
>
> *Before applying any development package, we recommend that you first back up the database in case changes need to be rolled back.*

The **Core** development package contains all the necessary business objects, quick actions, etc., needed by the integration.

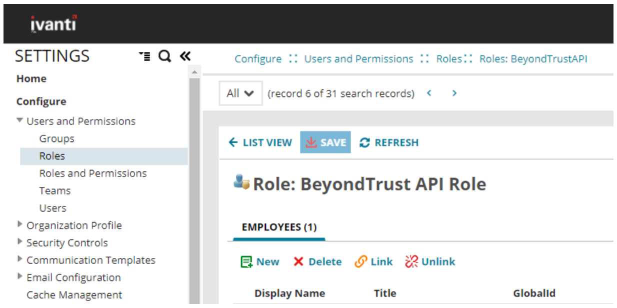
Once the contents of the **Core** development package have been verified:

1. Make sure you have taken the steps described in the note above to find and replace the example B Series Appliance hostname in the package file.
2. Log in to the Ivanti tenant as an administrator and access the admin UI.
3. Under **Build > Development Package > Packages**, select **Import Package** and browse to the file.

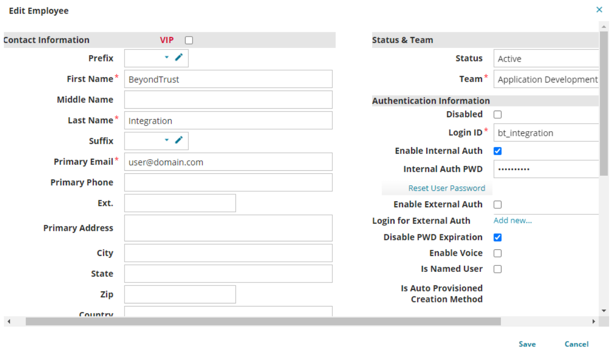


When the development package is successfully imported, a new **BeyondTrust API Role** should be listed under **Configure > Users and Permissions > Roles**.

1. Select the role and add a new employee to be used for API calls.



2. Ensure that **Internal Auth** is enabled.
3. Ensure that an **Internal Auth Password** is set.
4. Ensure that **Password Expiration** is disabled.



Edit Employee

Contact Information — VIP □

Prefix:
First Name*: BeyondTrust
Middle Name:
Last Name*: Integration
Suffix:
Primary Email*: user@domain.com
Primary Phone:
Ext.:
Primary Address:
City:
State:
Zip:
Country:

Status & Team

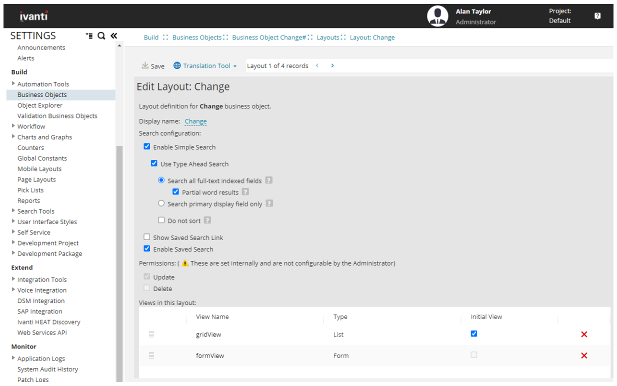
Status: Active
Team*: Application Development

Authentication Information

Disabled: □
Login ID*: bt_integration
Enable Internal Auth: ☑
Internal Auth PWD: ••••••••••
Reset User Password
Enable External Auth: □
Login for External Auth: Add new...
Disable PWD Expiration: ☑
Enable Voice: □
Is Named User: □
Is Auto Provisioned Creation Method

Update the User Interface

1. Under **Build > Business Objects**, select **Change > Layouts**, and then click the **Change** layout.
2. In the **Views in this layout** grid, select **formView** to edit the view.



Edit Layout: Change

Layout definition for **Change** business object.

Display name: Change

Search configuration:

☑ Enable Simple Search
☑ Use Type Ahead Search
● Search all full-text indexed fields
☑ Partial word results
○ Search primary display field only
□ Do not sort
□ Show Saved Search Link
☑ Enable Saved Search

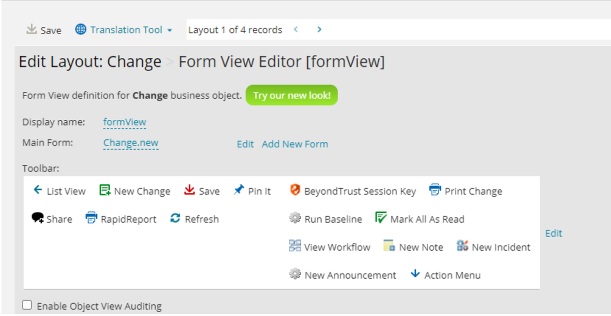
Permissions: (⚠ These are set internally and are not configurable by the Administrator)

☑ Update
□ Delete

Views in this layout:

View Name	Type	Initial View
gridView	List	☑
formView	Form	□

3. Click the **Edit** link to the right of the **Toolbar** section.



Edit Layout: Change Form View Editor [formView]

Form View definition for **Change** business object. Try our new look!

Display name: formView
Main Form: Change.new Edit Add New Form

Toolbar:

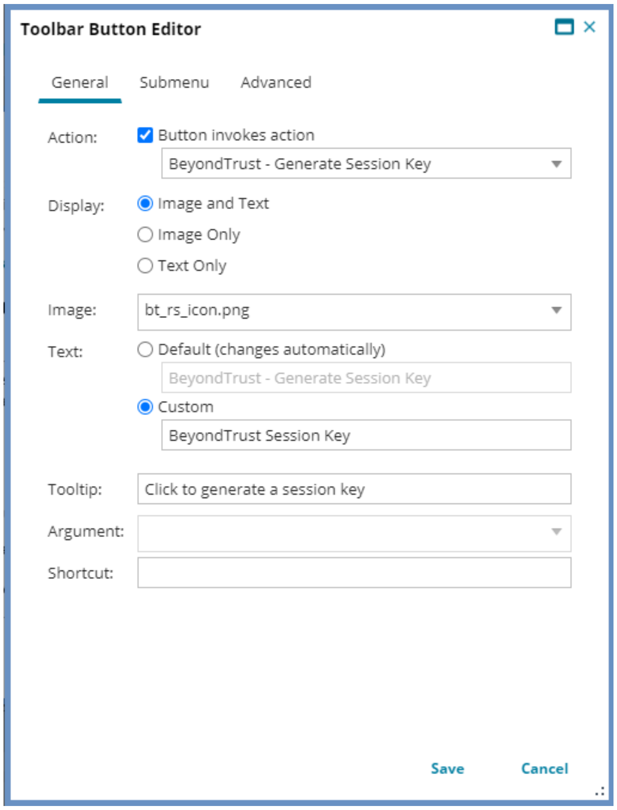
□ Enable Object View Auditing

4. In the **Toolbar Editor**, find and select the **BeyondTrust - Generate Session Key** action from the list at the bottom and drag it into position as the first item in the right half of the toolbar menu.

5. Configure the new toolbar button as follows:

Field Name	Value
Action	BeyondTrust - Generate Session Key
Display	Image and Text
Image	bt_rs_icon.png
Text (Custom)	BeyondTrust Session Key
Tooltip	Click to generate a BeyondTrust session key

6. Click **Save** on the **Button Editor** and **Save** again on the **Toolbar Editor**.



Action: ☑ Button invokes action
BeyondTrust - Generate Session Key

Display: ● Image and Text
○ Image Only
○ Text Only

Image: bt_rs_icon.png

Text: ○ Default (changes automatically)
BeyondTrust - Generate Session Key
● Custom
BeyondTrust Session Key

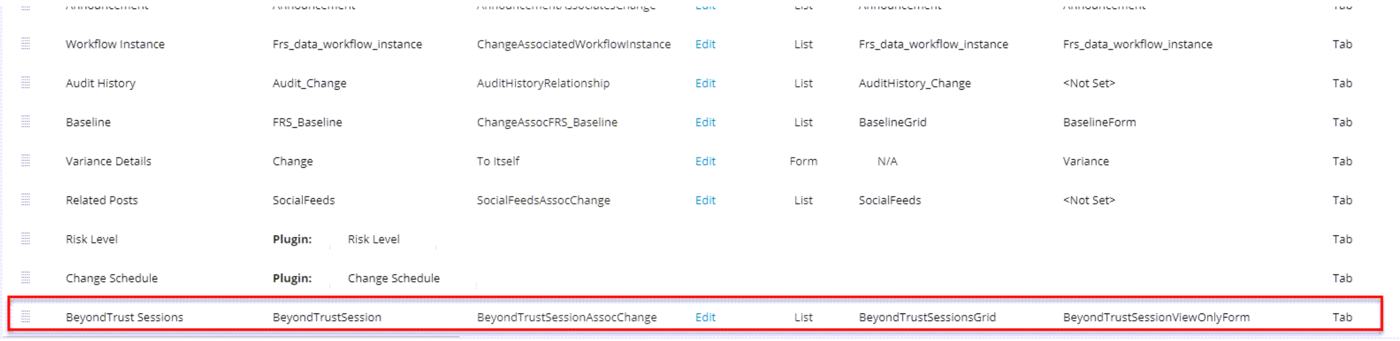
Tooltip: Click to generate a session key

Argument:

Shortcut:

7. Scroll to the bottom of the **Child Panels** grid and click the link to **Add Child Panel**.
8. Configure the new panel as follows:

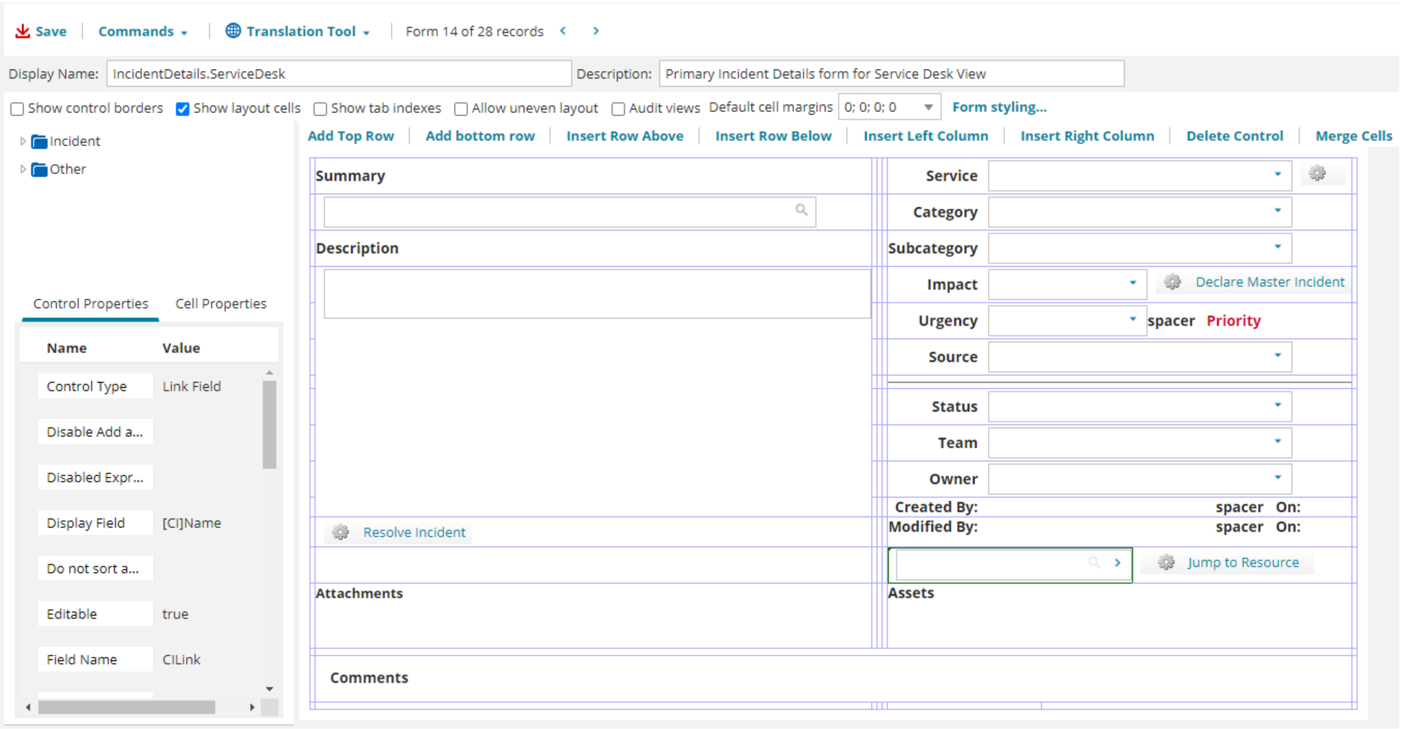
Field Name	Value
Display Name	BeyondTrust Sessions
Object	BeyondTrustSession
List	BeyondTrustSessionsGrid
Forms(s)	BeyondTrustSessionViewOnlyForm
Show Count	[Checked]



Announcement	Announcement	AnnouncementAssociatesChange	Edit	List	Announcement	Announcement	Tab
Workflow Instance	Frs_data_workflow_instance	ChangeAssociatedWorkflowInstance	Edit	List	Frs_data_workflow_instance	Frs_data_workflow_instance	Tab
Audit History	Audit_Change	AuditHistoryRelationship	Edit	List	AuditHistory_Change	<Not Set>	Tab
Baseline	FRS_Baseline	ChangeAssocFRS_Baseline	Edit	List	BaselineGrid	BaselineForm	Tab
Variance Details	Change	To Itself	Edit	Form	N/A	Variance	Tab
Related Posts	SocialFeeds	SocialFeedsAssocChange	Edit	List	SocialFeeds	<Not Set>	Tab
Risk Level	**Plugin:** Risk Level						Tab
Change Schedule	**Plugin:** Change Schedule						Tab
BeyondTrust Sessions	BeyondTrustSession	BeyondTrustSessionAssocChange	Edit	List	BeyondTrustSessionsGrid	BeyondTrustSessionViewOnlyForm	Tab

9. Click the **Edit** link in the **Toolbar** column and drag all of the toolbar buttons for the panel to the trash so that no buttons show on the **BeyondTrust Sessions** panel.
10. Click **Save** at the top to save all changes to the layout.
11. Repeat steps 1 through 10 for the **Change.SDA** and **Change.SDM** layouts and/or any custom layouts you may be using instead of these default layouts.
12. Under **Build > Business Objects > Service Request**, select the **Service Request** business object, and then repeat steps 1 through 10 for the **ServiceReqLayout.New** layout and/or any custom layouts you may be using instead of these default layouts.
13. Under **Build > Business Objects > Incident**, select the **Incident** business object, and then repeat steps 1 through 10 for the **IncidentLayout.ServiceDesk** layout and/or any custom layouts you may be using instead of these default layouts.
14. With the **Incident** business object still selected, swap from **Layouts** to **Forms**, and then select the **IncidentDetails.ServiceDesk** form.
15. Check the box to **Show layout cells**, and select the cell containing the **Assets** control.
16. Click the link above the form to **Insert Row Above**.
17. Expand the toolbar to the left of the form to show **Incident > Fields**, and then drag the **CILink** field into the newly created row.
18. Click the new control to select it, and then configure it as follows:

Field Name	Value
Display Field	[CI]Name
Editable	true
Label Pos	No Label


Form 14 of 28 records

Display Name: IncidentDetails.ServiceDesk
Description: Primary Incident Details form for Service Desk View

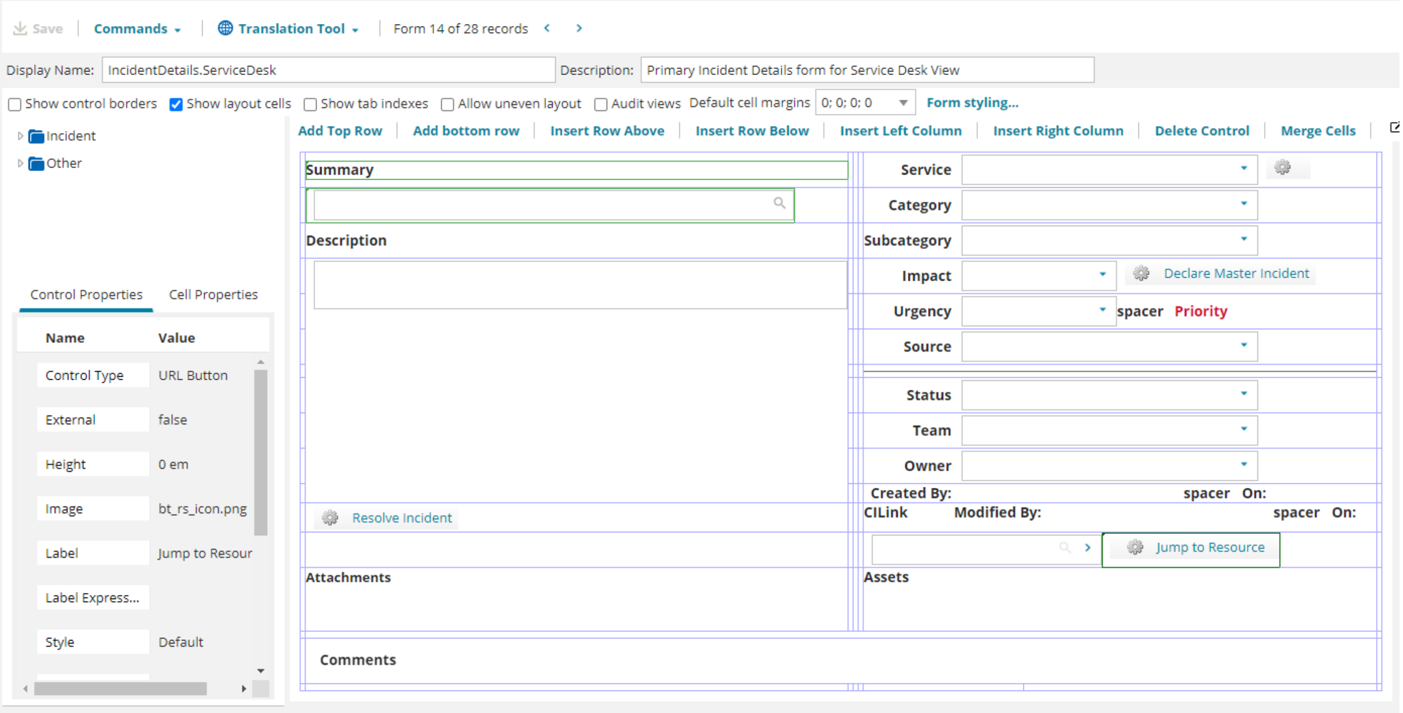
□ Show control borders ☑ Show layout cells □ Show tab indexes □ Allow uneven layout □ Audit views Default cell margins 0; 0; 0; 0

Name	Value
Control Type	Link Field
Disable Add a...	
Disabled Expr...	
Display Field	[CI]Name
Do not sort a...	
Editable	true
Field Name	CILink

19. Collapse the **Incident** tree in the toolbar, expand it to show **Other** items, and then drag a **URL Button** to the right of the **CILink** field.

20. Select the new button and configure it as follows:

Field Name	Value
Image	bt_rs_icon.png ***Note:*** *Use the* ***Image Manager*** *tool in the* ***Expression Editor*** *to select the image.*
Label	Jump to Resource
URL	`https://<BeyondTrust-hostname>/api/client_script?action=start_pinned_client_session&search_string=$([CI#.IncidentAssocCILink]Name)&type=rep&operation=generate&session.custom.external_key=$(RecId)&session.custom.item_id=$(IncidentNumber)&session.custom.item_type=Incident`



Display Name: IncidentDetails.ServiceDesk
Description: Primary Incident Details form for Service Desk View

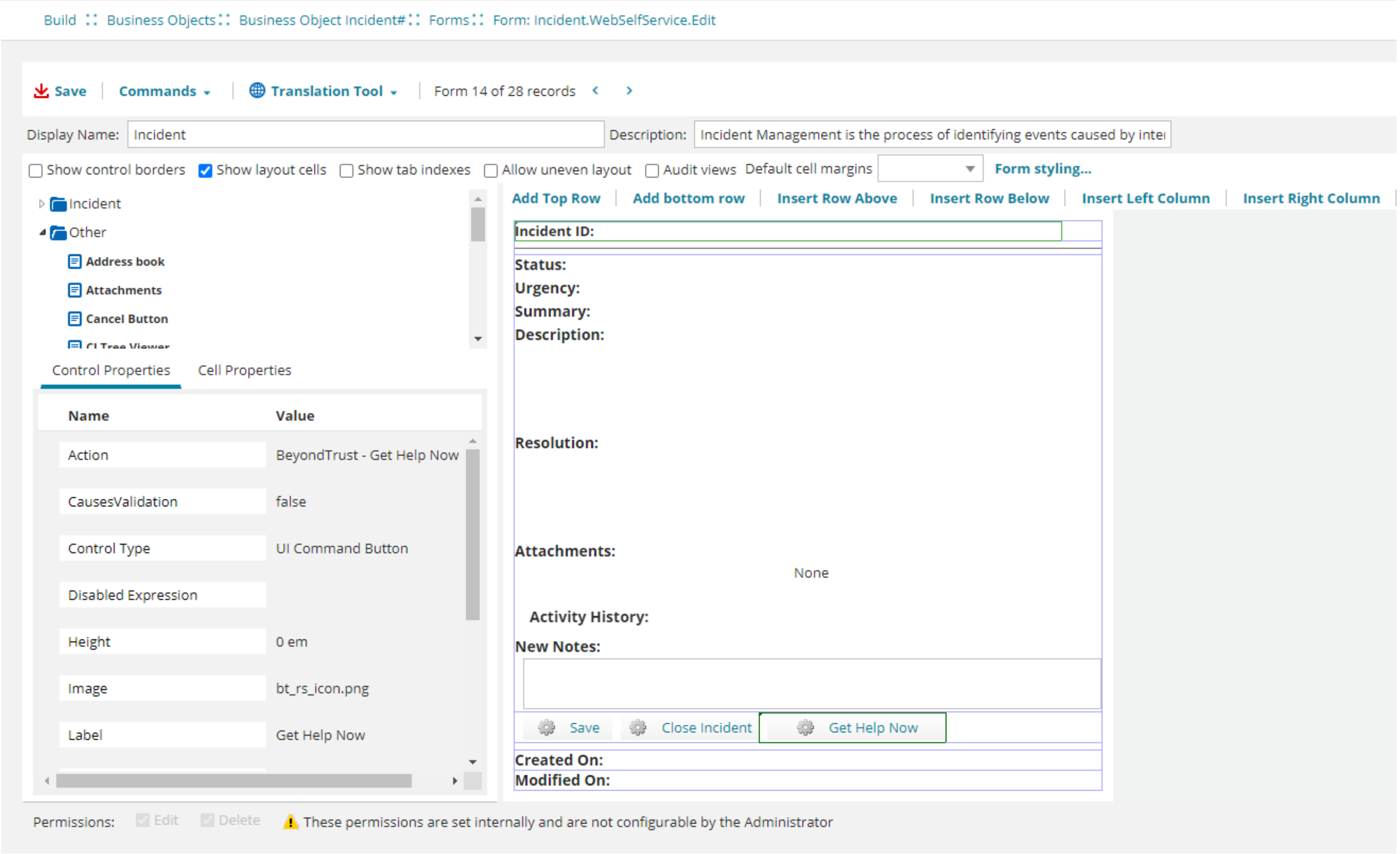
☐ Show control borders ☑ Show layout cells ☐ Show tab indexes ☐ Allow uneven layout ☐ Audit views Default cell margins 0; 0; 0; 0

Name	Value
Control Type	URL Button
External	false
Height	0 em
Image	bt_rs_icon.png
Label	Jump to Resour
Label Express...	
Style	Default

21. Click **Save** at the top to save changes to the form.
22. Select the **Incident.WebSelfService.Edit** form.
23. Expand the toolbar to show **Other** items, and then drag a **Command Button** to the right of the **Close Incident** button on the form.

24. Select the new button and configure it as follows:

Field Name	Value
Action	BeyondTrust - Get Help Now
CausesValidation	false
Image	bt_rs_icon.png ***Note:*** *Use the* ***Image Manager*** *tool in the* ***Expression Editor*** *to select the image.*
Label	Get Help Now



Build :: Business Objects :: Business Object Incident# :: Forms :: Form: Incident.WebSelfService.Edit

Display Name: Incident
Description: Incident Management is the process of identifying events caused by inte

□ Show control borders ☑ Show layout cells □ Show tab indexes □ Allow uneven layout □ Audit views Default cell margins

Name	Value
Action	BeyondTrust - Get Help Now
CausesValidation	false
Control Type	UI Command Button
Disabled Expression	
Height	0 em
Image	bt_rs_icon.png
Label	Get Help Now

Permissions: ☑ Edit ☑ Delete ⚠ These permissions are set internally and are not configurable by the Administrator

25. Click **Save** at the top to save changes to the form.

Configure BeyondTrust Remote Support for the Ivanti Service Manager Integration

Several configuration changes are necessary on the B Series Appliance to integrate with Ivanti Software. You must make these changes on each B Series Appliance for which you intend to create a plugin configuration, described in "Configure the Ivanti Plugin for Integration with BeyondTrust Remote Support" on page 14.

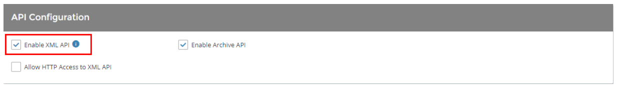
All of the steps in this section take place in the BeyondTrust **/login** administrative interface. Access your Remote Support interface by going to the hostname of your B Series Appliance followed by **/login** (e.g., https://support.example.com/login).

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.

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



API Configuration

☑ Enable XML API ☑ Enable Archive API

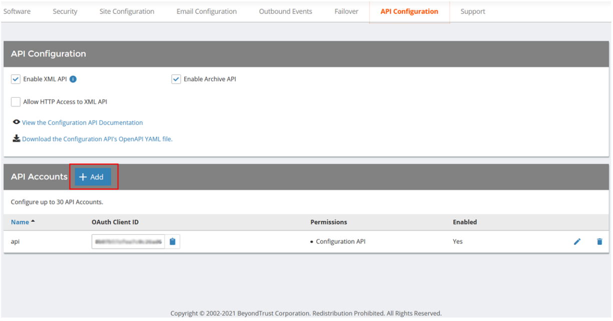
□ Allow HTTP Access to XML API

Create an OAuth API Account

Management | API CONFIGURATION

The Ivanti Service Manager API account is used from within Ivanti Service Manager 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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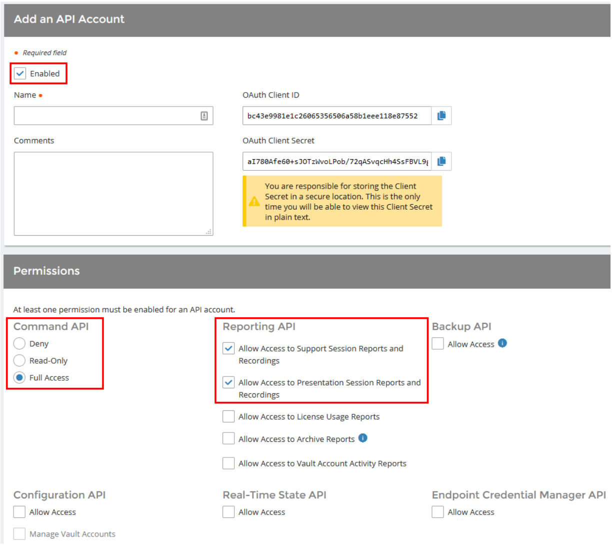
3. Check **Enabled**.
4. Enter a name for the account.
5. **OAuth Client ID** and **OAuth Client Secret** is used during the OAuth configuration step in Ivanti Service Manager.
6. Under **Permissions**, check the following:
    - Command API: **Full Access**.
    - Reporting API: **Allow Access to Support 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

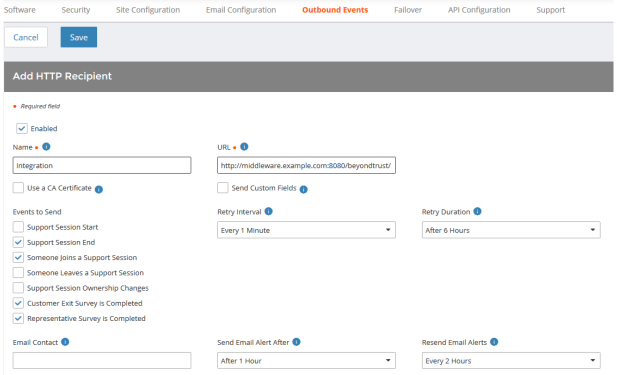
Endpoint Credential Manager API
□ Allow Access

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.



Software | Security | Site Configuration | Email Configuration | Outbound Events | Failover | API Configuration | Support

Cancel | 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

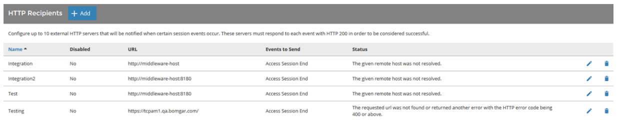
Email Contact

Send Email Alert After
After 1 Hour

Resend Email Alerts
Every 2 Hours

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**.

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.

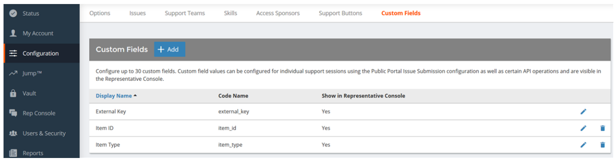


Configure up to 10 external HTTP servers that will be notified when certain session events occur. These servers must respond to each event with HTTP 200 in order to be considered successful.

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 Custom Fields

Under **Configuration > Custom Fields**, add two new custom fields. Enter the following values:



Configure up to 30 custom fields. Custom field values can be configured for individual support sessions using the Public Portal Issue Submission configuration as well as certain API operations and are visible in the Representative Console.

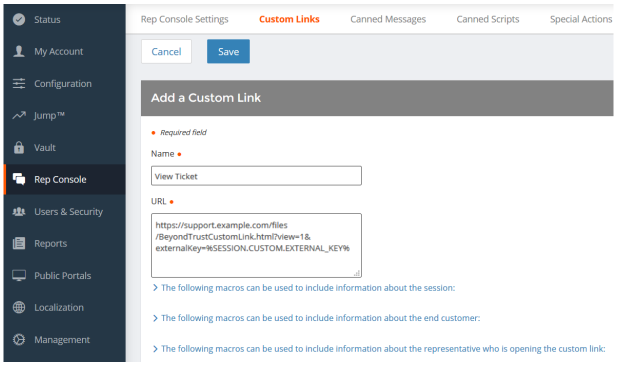
Display Name	Code Name	Show in Representative Console
External Key	external_key	Yes
Item ID	item_id	Yes
Item Type	item_type	Yes

Display Name	Code Name	Show in Rep Console
Item ID	item_id	Checked
Item Type	item_type	Checked

Add a Custom Link

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

1. Browse to **Rep Console > Custom Links**.
2. Click **Add**.
3. Enter a name for the link, and then set the URL to `https://support.example.com`



• Required field

Name •
View Ticket

URL •
https://support.example.com/files/BeyondTrustCustomLink.html?view=1&externalKey=%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:

`/files/IvantiCustomLink.html?view=1&externalKey=%SESSION.CUSTOM.EXTERNAL_KEY%` where `support.example.com` is your BeyondTrust site hostname.

> ***Note:** The page referenced in the custom link URL does not yet exist but is created at the end of the section "Configure the Ivanti Plugin for Integration with BeyondTrust Remote Support" on page 14.*

4. Click **Save** to save the new link.

Configure the Ivanti Plugin for Integration with BeyondTrust Remote Support

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

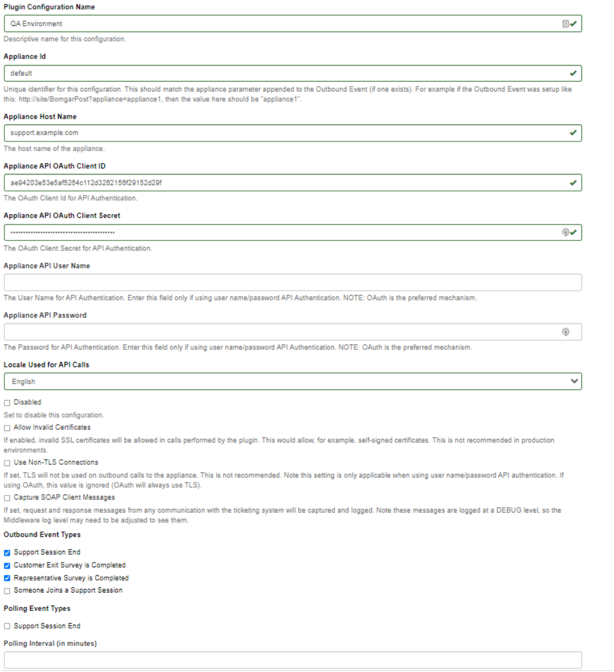
> *For more information on installing and working with the BeyondTrust Middleware Engine, please see the BeyondTrust Remote Support Middleware Engine Installation and Configuration document at www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine.*

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 **Ivanti 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:

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.

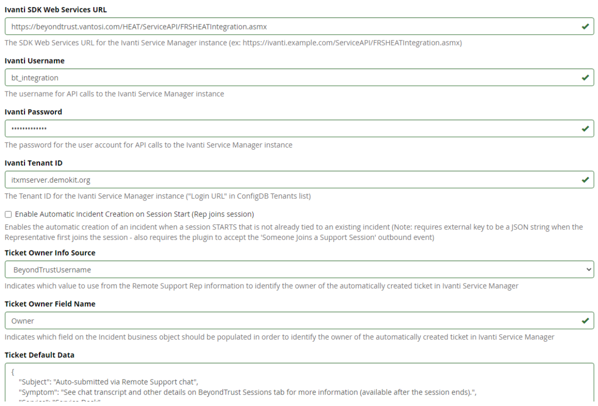
> ***Note:*** *One caveat to polling behavior versus the use of outbound events is that if a session has ended but the customer exit survey has not yet been submitted within the same polling interval, the customer exit survey is not processed. This does not apply to representative surveys since the session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

Ivanti Service Manager Instance

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

1. **Ivanti SDK Web Services URL:** The SDK Web Services URL for the Ivanti instance. For example, **https://ivanti.example.com/ServiceAPI/FRSHEATIntegration.asmx**).
2. **Ivanti Username:** The username of the API account.
3. **Ivanti Password:** The password of the above user.



Ivanti SDK Web Services URL
https://beyondtrust.vantosi.com/HEAT/ServiceAPI/FRSHEATIntegration.asmx ✓
The SDK Web Services URL for the Ivanti Service Manager instance (ex: https://ivanti.example.com/ServiceAPI/FRSHEATIntegration.asmx)

Ivanti Username
bt_integration ✓
The username for API calls to the Ivanti Service Manager instance

Ivanti Password
••••••••••••• ✓
The password for the user account for API calls to the Ivanti Service Manager instance

Ivanti Tenant ID
itxmserver.demokit.org ✓
The Tenant ID for the Ivanti Service Manager instance ("Login URL" in ConfigDB Tenants list)

☐ Enable Automatic Incident Creation on Session Start (Rep joins session)
Enables the automatic creation of an incident when a session STARTS that is not already tied to an existing incident (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)

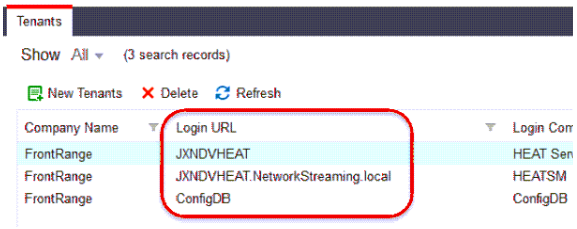
Ticket Owner Info Source
BeyondTrustUsername
Indicates which value to use from the Remote Support Rep information to identify the owner of the automatically created ticket in Ivanti Service Manager

Ticket Owner Field Name
Owner ✓
Indicates which field on the Incident business object should be populated in order to identify the owner of the automatically created ticket in Ivanti Service Manager

Ticket Default Data

```
{
  "Subject": "Auto-submitted via Remote Support chat",
  "Symptom": "See chat transcript and other details on BeyondTrust Sessions tab for more information (available after the session ends).",
```

4. **Ivanti Tenant ID:** The ID of the tenant instance targeted by the integration. If unknown, you can find this by logging into the **ConfigDB** web interface and viewing the **Tenants** list. The Tenant ID is listed as the **Login URL** in the list and detail views.



Company Name	Login URL	Login Con
FrontRange	JXNDVHEAT	HEAT Sen
FrontRange	JXNDVHEAT.NetworkStreaming.local	HEATSM
FrontRange	ConfigDB	ConfigDB

5. **Enable Automatic Incident Creation on Session Start:** If checked, the plugin processes **support_conference_member_added** events and the external key to determine whether to create a ticket within Ivanti or not. The plugin attempts to create the ticket only if this setting is enabled, if the conference member joining the conference is a representative, and if the external key is a JSON string.
6. **Ticket Owner Info Source:** By default, the integration uses the BeyondTrust representative's username to identify them as the owner of the newly created ticket. Optionally, it can also use the representative's public display name in various formats or ignore the representative's information altogether, instead always using the default value supplied in the JSON string configured for **Ticket Default Data**.
7. **Ticket Default Data:** A JSON string containing values that can be used to prepopulate certain fields on the newly created ticket.

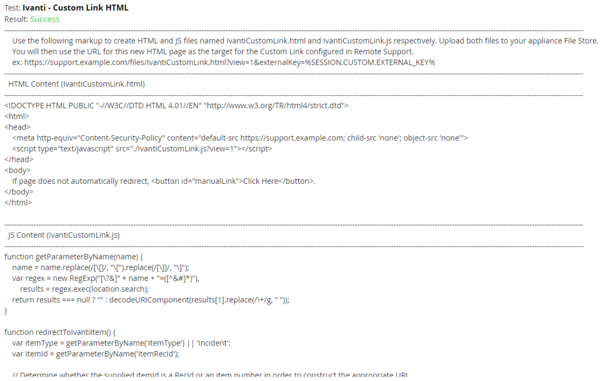
Once all settings have been entered, **Save** the configuration.

Test Settings and Generate HTML Content

Once the proper configuration has been entered and saved, use the tool's **Test this Plugin Configuration** function to verify the settings. In addition to verifying settings for both BeyondTrust and Ivanti, the page outputs a snippet of HTML that is used in the creation of an intermediate page used for custom links. Once the settings are successful and the markup is generated, create the custom link as described below.

Create the Custom Link Page

1. Create an empty text file using Notepad or another text editor and copy and paste the HTML content from generated content on the plugin test page into the file.
2. Save the file as **IvantiCustomLink.html**.
3. Repeat the above steps to copy the JS content into a separate file, and save the file as **IvantiCustomLink.js**
4. Log in to the BeyondTrust **/login** interface and upload both files to the file store, under **Public Portals > File Store**.



```
Test: Ivanti - Custom Link HTML
Result: Success
---------------------------------------------------------------------------------------------------------------
   Use the following markup to create HTML and JS files named IvantiCustomLink.html and IvantiCustomLink.js respectively. Upload both files to your appliance File Store.
   You will then use the URL for this new HTML page as the target for the Custom Link configured in Remote Support.
   ex: https://support.example.com/files/IvantiCustomLink.html?view=1&externalKey=%SESSION.CUSTOM.EXTERNAL_KEY%
---------------------------------------------------------------------------------------------------------------
  HTML Content (IvantiCustomLink.html)
---------------------------------------------------------------------------------------------------------------
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01//EN" "http://www.w3.org/TR/html4/strict.dtd">
<html>
<head>
   <meta http-equiv="Content-Security-Policy" content="default-src https://support.example.com; child-src 'none'; object-src 'none'">
   <script type="text/javascript" src="./IvantiCustomLink.js?view=1"></script>
</head>
<body>
   If page does not automatically redirect, <button id="manualLink">Click Here</button>.
</body>
</html>

---------------------------------------------------------------------------------------------------------------
  JS Content (IvantiCustomLink.js)
---------------------------------------------------------------------------------------------------------------
function getParameterByName(name) {
   name = name.replace(/[\[]/, "\[").replace(/[\]]/, "\]");
   var regex = new RegExp("[\?&]" + name + "=([^&#]*)"),
      results = regex.exec(location.search);
   return results === null ? "" : decodeURIComponent(results[1].replace(/\+/g, " "));
}

function redirectToIvantiItem() {
   var itemType = getParameterByName('itemType') || 'Incident';
   var itemId = getParameterByName('itemRecId');

   // Determine whether the supplied itemId is a RecId or an item number in order to construct the appropriate URL
```

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.

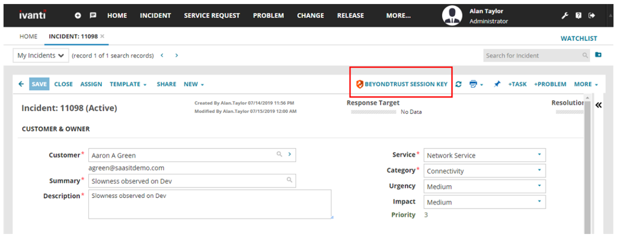
Note: *If you are editing a template, we recommend copying and saving the original in case the changes need to be reverted.*

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

Use Cases for the Ivanti Service Manager 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.



Incident: 11098 (Active)

Created By Alan.Taylor 07/14/2019 11:56 PM
Modified By Alan.Taylor 07/15/2019 12:00 AM

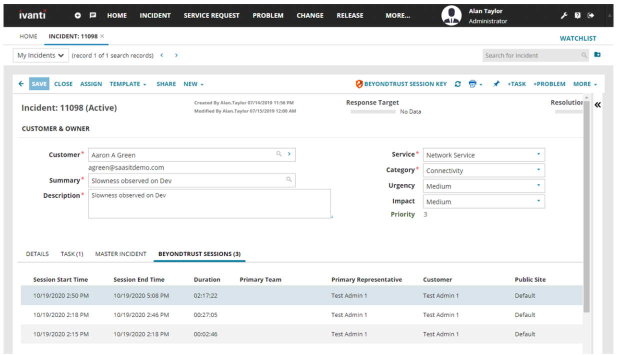
No Data

Customer*	Aaron A Green agreen@saasitdemo.com	Service*	Network Service
Summary*	Slowness observed on Dev	Category*	Connectivity
Description*	Slowness observed on Dev	Urgency	Medium
		Impact	Medium
		Priority	3

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)



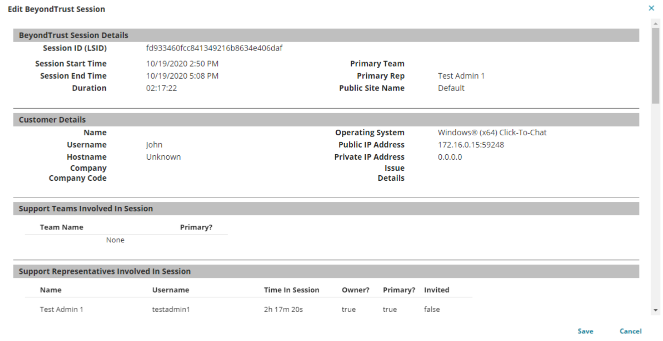
Incident: 11098 (Active)

Created By Alan.Taylor 07/14/2019 11:56 PM
Modified By Alan.Taylor 07/15/2019 12:00 AM

No Data

Customer*	Aaron A Green agreen@saasitdemo.com	Service*	Network Service
Summary*	Slowness observed on Dev	Category*	Connectivity
Description*	Slowness observed on Dev	Urgency	Medium
		Impact	Medium
		Priority	3

Session Start Time	Session End Time	Duration	Primary Team	Primary Representative	Customer	Public Site
10/19/2020 2:50 PM	10/19/2020 5:08 PM	02:17:22		Test Admin 1	Test Admin 1	Default
10/19/2020 2:18 PM	10/19/2020 2:46 PM	00:27:05		Test Admin 1	Test Admin 1	Default
10/19/2020 2:15 PM	10/19/2020 2:18 PM	00:02:46		Test Admin 1	Test Admin 1	Default



BeyondTrust Session Details

Session ID (LSID)	fd933460fcc841349216b8634e406daf		
Session Start Time	10/19/2020 2:50 PM	Primary Team	
Session End Time	10/19/2020 5:08 PM	Primary Rep	Test Admin 1
Duration	02:17:22	Public Site Name	Default

Customer Details

Name		Operating System	Windows® (x64) Click-To-Chat
Username	John	Public IP Address	172.16.0.15:59248
Hostname	Unknown	Private IP Address	0.0.0.0
Company		Issue	
Company Code		Details	

Support Teams Involved In Session

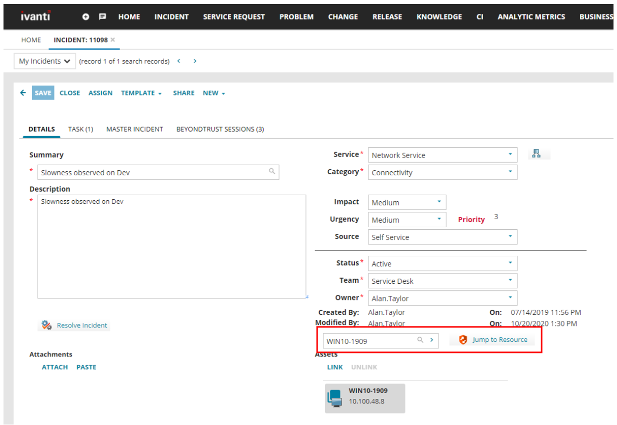
Team Name	Primary?
None	

Support Representatives Involved In Session

Name	Username	Time In Session	Owner?	Primary?	Invited
Test Admin 1	testadmin1	2h 17m 20s	true	true	false

Jump to Configuration Item

Support staff can leverage BeyondTrust Jump Technology to access a configuration item associated with a ticket directly from the Ivanti ticket. By default, the button attempts to Jump to a pinned Jump Client, but the URL can be modified to perform one of the other Jump types as needed.



Summary: Slowness observed on Dev

Description: Slowness observed on Dev

Service: Network Service

Category: Connectivity

Impact: Medium

Urgency: Medium

Priority 3

Source: Self Service

Status: Active

Team: Service Desk

Owner: Alan.Taylor

Created By: Alan.Taylor On: 07/14/2019 11:56 PM

Modified By: Alan.Taylor On: 10/20/2020 1:30 PM

WIN10-1909

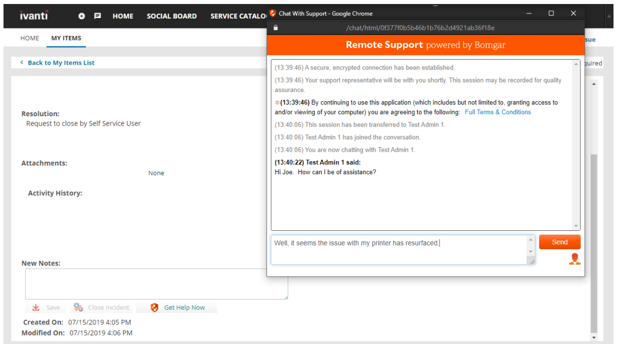
Attachments

Assets

WIN10-1909
10.100.48.8

Click-to-Chat for Self Service Users

Self Service users can open their submitted tickets and start a chat support session directly from the Ivanti 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.



/chat/html/0f377f0b5b46b1b76b2d4921ab36f18e

(13:39:46) A secure, encrypted connection has been established.

(13:39:46) Your support representative will be with you shortly. This session may be recorded for quality assurance.

(13:39:46) By continuing to use this application (which includes but not limited to, granting access to and/or viewing of your computer) you are agreeing to the following: Full Terms & Conditions

(13:40:06) This session has been transferred to Test Admin 1.

(13:40:06) Test Admin 1 has joined the conversation.

(13:40:06) You are now chatting with Test Admin 1.

(13:40:22) Test Admin 1 said:
Hi Joe. How can I be of assistance?

Well, it seems the issue with my printer has resurfaced.

Resolution:
Request to close by Self Service User

Attachments:
None

Activity History:

New Notes:

Created On: 07/15/2019 4:05 PM
Modified On: 07/15/2019 4:06 PM

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 Ivanti and provides the representative with any available issue details, history, or other context to help quickly resolve the issue.

Manually Associate Sessions with Tickets

Whether a representative has just created a ticket for the current session or has found that one already exists, even sessions originating outside the scope of a Ivanti item can be manually associated with the appropriate item, allowing session details to be automatically added to the ticket when the session ends.

To make this association, the representative enters the numeric ID of the Change, Incident, or Service Request into the **External Key** field while in session. Because these numeric IDs are not unique across business objects in Ivanti, the representative can indicate the appropriate item type with a `-c` (Change), `-i` (Incident), or `-s` (Service Request) appended to the end of the number. For example, `15302-i` would be associated with Incident #15302.

Automatic Ticket Creation

Simplify workflows and reduce the number of clicks necessary for a support representative by automatically creating a ticket from a session.

> ***Note:*** *This feature requires a separate services engagement to implement.*