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BeyondTrust Integration with Autotask

IMPORTANT!

You must purchase this integration separately from both your Remote Support software and your Autotask solution. For more information, contact BeyondTrust sales.

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:

<table>
<thead>
<tr>
<th>Outbound From</th>
<th>Inbound To</th>
<th>TCP Port #</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>BeyondTrust Middleware Engine Server</td>
<td>Autotask</td>
<td>443</td>
<td>API calls from the BeyondTrust Middleware Engine server.</td>
</tr>
<tr>
<td>BeyondTrust Middleware Engine Server</td>
<td>Secure Remote Access Appliance</td>
<td>443</td>
<td>API calls from the BeyondTrust Middleware Engine server.</td>
</tr>
<tr>
<td>Secure Remote Access Appliance</td>
<td>BeyondTrust Middleware Engine Server</td>
<td>8180 (default) 443 (optional)</td>
<td>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.</td>
</tr>
</tbody>
</table>

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 Autotask integration includes a few LiveLinks which must be created 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. Click the New button.
3. Create a user with the System Administrator security level.

Create BeyondTrust Application

1. In Autotask, go to Admin > Extensions & Integrations > Autotask Add-ons > LiveLinks Designer.
2. On the Applications tab, click the New button.
3. Enter BeyondTrust as the application name.
4. Click Save and Close.

Create the BeyondTrust Jump LiveLink

1. In Autotask, go to Admin > Extensions & Integrations > Autotask Add-ons > LiveLinks Designer.
2. On the LiveLinks tab, click the New button.
3. Create the LiveLink with the following settings:

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

4. On the Configuration tab, ensure both Ticket Details Window - Service Desk and Ticket Grid - Service Desk are checked.
5. Click **Save and Close**.

6. Right-click the 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 and Close** to publish the LiveLink.

---

**Create the BeyondTrust Session Key LiveLink**

1. Create another LiveLink with the following settings:

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

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 Secure Remote Access Appliance to integrate with Autotask. You must make these changes on each appliance for which you intend to create a plugin configuration, described in "Configure the Autotask Plugin for Integration with BeyondTrust Remote Support" on page 11.

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 Secure Remote Access Appliance followed by /login (e.g., https://support.example.com/login).

Verify the API Is Enabled

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.

Create an API Service Account - BeyondTrust 16.1 and Earlier

The API user account is used from within the integration to make BeyondTrust Command API calls to BeyondTrust.

2. Click Create New User and name it Integration or something similar.
3. Leave Must Reset Password at Next Login unchecked.
5. Set Allowed to View Support Session Reports to View All Sessions.
6. Check Allowed to view support session recordings.
7. Set Allowed to View Presentation Session Reports to View All Sessions.
8. Check Allowed to Use Reporting API and Allowed to Use Command API.
9. Scroll to the bottom and save the account.
Create an API Service Account - BeyondTrust 16.2 and Later

1. Go to Management > API Configuration and click Add to create a new API account.
2. Provide a name for the API account.
3. Under Permissions, check Full Access to the Command API.
4. For the Reporting API, check Allow Access to Support Session Reports and Recordings and Allow Access to Presentation Session Reports and Recordings.
5. Be sure to copy the values for both the OAuth Client ID and OAuth Client Secret for use in a later step.
6. Click Save to create the account.

Add an Outbound Event URL

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.
6. Now, the list of outbound events should contain 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.

**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**

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 Secure Remote Access Appliance, deploy and configure the Autotask 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 Autotask Plugin shows in the list of plugins. Click the clipboard icon to add a new configuration.

Secure Remote Access Appliance

The first portion of the plugin configuration provides the necessary settings for communication between the plugin and the Secure Remote Access 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 Secure Remote Access Appliance. If outbound events are not being used, this value is still required, but any value may be used.
3. **Secure Remote Access Appliance Host Name**: The hostname of the Secure Remote Access Appliance. Do not include https:// or other URL elements.
4. **BeyondTrust Integration API OAuth Client ID**: When using API accounts in BeyondTrust Remote Support 16.2.1 or newer, this field should contain the Client ID of the OAuth account.
5. **BeyondTrust Integration API OAuth Client Secret**: When using API Accounts available in BeyondTrust Remote Support 16.2.1 or newer, this field should contain the client Secret of the OAuth account.
6. **BeyondTrust Integration API User Name**: If using a BeyondTrust Remote Support version prior 16.2.1, this field should contain the username of the API service account created on the Secure Remote Access Appliance.
7. **BeyondTrust Integration API Password**: If using a BeyondTrust Remote Support version prior 16.2.1, this field should contain the password of the above user.
8. **Locale Used for BeyondTrust API Calls:** This value directs the Secure Remote Access Appliance to return session data in the specified language.

9. **Disabled:** Enable or disable this plugin configuration.

10. **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. This is not recommended in production environments.

11. **Use Non-TLS Connections:** Leave unchecked unless it is the specific goal to use non-secure connections to the Secure Remote Access 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. Using non-secure connections is discouraged.

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

12. **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.

   a. **Support Session End**
   
   b. **Customer Exit Survey is Completed**
   
   c. **Representative Survey is Completed**

13. **Polling Event Types:** If network constraints limit connectivity between the Secure Remote Access Appliance and the middleware engine such that outbound events cannot be used, an alternative is to use polling. The middleware engine regularly polls the Secure Remote Access 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.

14. **Polling Interval:** Enter only if polling is used. This determines how often the middleware engine polls the Secure Remote Access Appliance for sessions that have ended.

15. **Retry Attempt Limit:** Enter the number of retries that can be attempted if the plugin fails to process an event.

16. **Retry Outbound Event Types:** Specify which outbound events the plugin retries if it fails to process the event.

17. **Retry Polling Event Types:** Specify which polling events the plugin retries if it fails to process the 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://web-services<#>.autotask.net/atwservices/1.5/atws.asmx, where <#> is the same number found in the URL used to access the Autotask web interface (e.g., https://ww<#>.autotask.net).
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.
   a. **Enable Automatic Ticket Creation on Session Start:** When a session starts that is not already tied to an existing ticket, a ticket is automatically created.
   
   **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.
   
   b. **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.
   
   c. **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.
   
   d. **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.
   
   e. **summaryNotes:** This is also a required field for time entry creation. The value supplied is used for all sessions.

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 files are used by the plugin to format the textual 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 changes need to be made to a template, it is a good idea to first back up the original in case the changes ever need to be reverted.

*For more information on Handlebars templates, please see [handlebarsjs.com](http://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.

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)
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.

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.

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.