



# BeyondTrust

## **Remote Support JIRA Service Management Integration**

# Table of Contents

---

<b>Integrate BeyondTrust Remote Support with Jira Service Management</b> .....	<b>3</b>
<b>Prerequisites</b> .....	<b>4</b>
Network Considerations .....	4
<b>Create Remote Support API Account</b> .....	<b>5</b>
Verify the API is Enabled .....	5
Create an OAuth API Account .....	5
<b>Configure Jira Service Management</b> .....	<b>6</b>
Install Application .....	6
Configure Application .....	6
Add Permissions .....	8
<b>Configure BeyondTrust for Jira Service Management</b> .....	<b>10</b>
Create Outbound Event .....	10
Create Custom Link .....	10
<b>Use Cases</b> .....	<b>11</b>
Generate Session Key .....	11
Import BeyondTrust Session Data into an Issue .....	11
Access an Issue from the Representative Console .....	11
Auto-Issue Creation .....	11
Auto-Issue State Transition .....	11

# Integrate BeyondTrust Remote Support with Jira Service Management

This document describes the installation and configuration of the integration between BeyondTrust Remote Support and Jira Service Management, Atlassian's cloud-based ITSM offering. The integration consists primarily of an application that is deployed within the Jira Service Management environment. This application was developed on Atlassian's next-generation Forge platform.

Installation and configuration requires checking the prerequisites, preparing Remote Support for the integration, installing and configuring the integration with Jira Service Management, and then configuring the integration within Remote Support.



*For more information on the functionality provided by the integration, please see ["Use Cases" on page 11](#).*

## Prerequisites

Before proceeding with the installation and configuration of the integration with Jira Service Management, it is important to ensure the appliance can send outbound events.

## Network Considerations

Your Remote Support appliance needs the ability to connect to a public URL that is generated as part of the app installation within Jira Service Management. Communication is in the form of secure HTTP traffic on TCP port 443. The purpose of this connectivity is to allow the appliance to send outbound events to the app or integration when specified events are triggered.



*For more information, please see [Outbound Events](https://www.beyondtrust.com/docs/remote-support/how-to/integrations/outbound-events/index.htm) at <https://www.beyondtrust.com/docs/remote-support/how-to/integrations/outbound-events/index.htm>.*

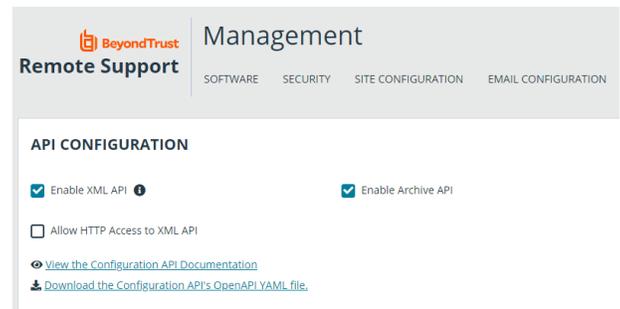
## Create Remote Support API Account

The integration requires an API account for access to data on the Remote Support appliance. This is created before installing the application in Jira Service Management.

### Verify the API is Enabled

The BeyondTrust XML API must 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 OAuth API Account

The API account is used from within JIRA Service Management to make API calls to Remote Support.

1. In `/login`, navigate to **Management > API Configuration**.
2. Click **Add**.
3. Check **Enabled**.
4. Enter a name for the account.
5. OAuth Client ID and OAuth Client Secret are used during subsequent steps when configuring the app in Jira Service Management.
6. Under **Permissions**, check **Full Access** for the **Command API** and the two permissions to **Allow Access to Support (and Presentation) Session Reports** and **Recordings for the Reporting API**.
7. Click **Save** at the top of the page to create the account.

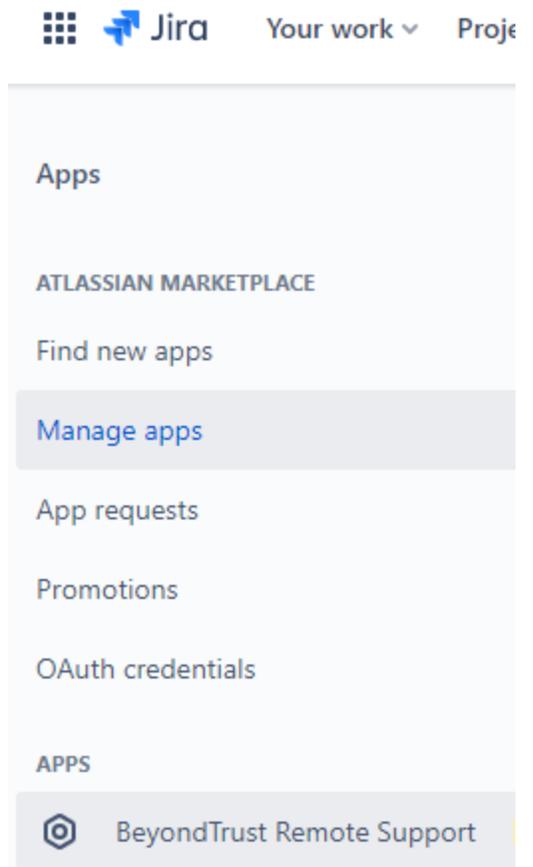
# Configure Jira Service Management

## Install Application

The installation application is provided via a shared install link. Please contact BeyondTrust Technical Support for that link.

## Configure Application

1. Authenticate to your Atlassian environment as an administrator.
2. Click **Apps > Manage apps**.



3. In the left menu, click the **BeyondTrust Remote Support** app.
4. Toggle the option to **Enable Integration**.

5. Under **General Settings** provide the **Appliance Hostname**, **OAuth Client ID**, and **OAuth Client Secret** in the appropriate fields.
6. Note the **Outbound Event URL**. This is required for later configuration in **BeyondTrust Remote Support**.
7. (Optional). If you wish to have the integration automatically generate issues for Remote Support sessions not associated with an existing issue, check the box to **Enable Auto-Create** and provide the **Project Key** and **Issue Type** you would like it to create. Also, if only certain unassociated sessions should trigger issue creation, a **Trigger Value** can be supplied and the integration creates an issue only if that value is present in the external key of the session.



**Note:** If using **Trigger Value**, see the [Session Generation API documentation](https://www.beyondtrust.com/docs/remote-support/how-to/integrations/api/session-gen/index.htm) at <https://www.beyondtrust.com/docs/remote-support/how-to/integrations/api/session-gen/index.htm> for more information on initiating sessions with a prepopulated external key.

8. (Optional). If automatic issue state transition based on exit survey results is desired, **Enable Auto-Transition**, select the desired survey type and provide the issue **State**, survey **Question Name**, and **Response** for which you wish to trigger automatic issue state transition. All auto-transition configuration values are case-insensitive but may not apply to all issue types.
9. Click **Submit** to save the configuration.

Dashboards ▾ People ▾ Apps ▾ **Create**

### BeyondTrust Remote Support

Use this form to configure the integration with BeyondTrust Remote Support

Enable Integration

#### General Settings

Appliance Hostname \*

support.example.com

OAuth Client ID \*

OAuth Client Secret \*

Use the following URL to create your Outbound Event:

https://

#### Auto-Create Settings

Enable Auto-Create

Project Key

Issue Type

Trigger Value

External Key

External Key Value

External Key Label

External Key Value Label

**Submit**

### Auto-Transition Settings

Enable Auto-Transition

#### Auto Transition

Automatically transition issue state based on the selected trigger

Rep Exit Survey

Customer Exit Survey

#### State

(required if auto-transition enabled)

Provide the desired state to transition the issue into

#### Question Name

(required if auto-transition enabled)

Provide the survey question name which will trigger the state transition

#### Response

(required if auto-transition enabled)

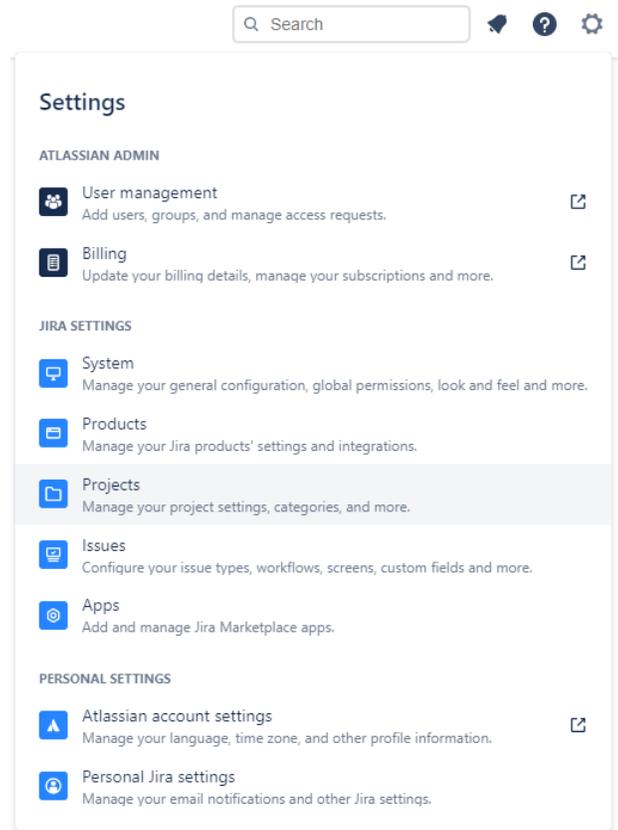
Provide the survey question response which will trigger the state transition

**i** For more information on how exit surveys can be configured in your Remote Support BeyondTrust Appliance B Series, see [Customize the Uninstall Message and Exit Surveys at https://www.beyondtrust.com/docs/remote-support/how-to/customize-portals/post-session-behavior.htm](https://www.beyondtrust.com/docs/remote-support/how-to/customize-portals/post-session-behavior.htm).

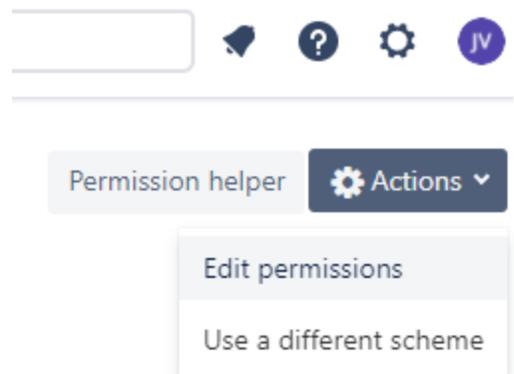
## Add Permissions

While the app specifies and requests permissions to perform its functions, an additional step is necessary to ensure the requested permissions are granted.

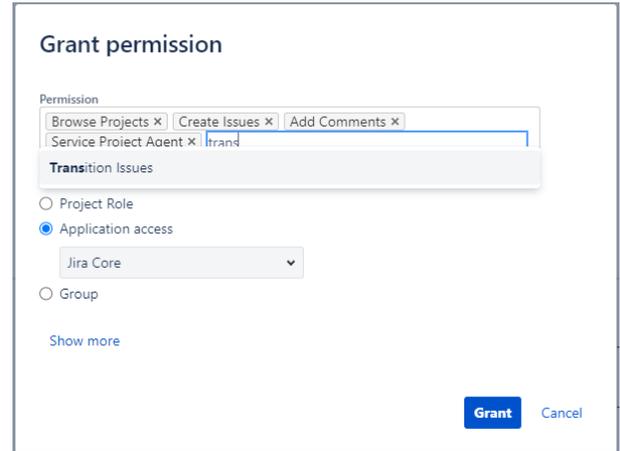
1. Navigate to **Settings > Jira Settings > Projects**.
2. If there is more than one project available, select the appropriate project from the list.
3. In the left menu, click **Project Settings**.
4. Click **Permissions**.



5. Click to expand the **Actions** menu in the upper-right corner, and then click **Edit permissions**.
6. Click the link to edit the permissions for any of the permissions items.
7. In the **Permission** box, remove any permission already there and begin typing to add the following permissions to the box: **Browse Projects, Create Issues, Add Comments, Service Project Agent, and Transition Issues**.



8. Check the box for **Application access** and in the dropdown below, select **Jira Core**.
9. Click the **Grant** button.



**Grant permission**

Permission

- Browse Projects ×
- Create Issues ×
- Add Comments ×
- Service Project Agent × | trans

**Transition Issues**

Project Role

Application access

Jira Core ▼

Group

[Show more](#)

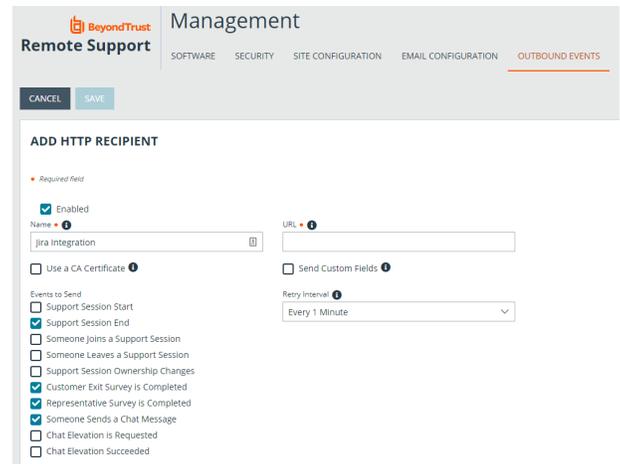
**Grant** Cancel

# Configure BeyondTrust for Jira Service Management

When the app is deployed and configured within Jira Service Management, complete the configuration within Remote Support.

## Create Outbound Event

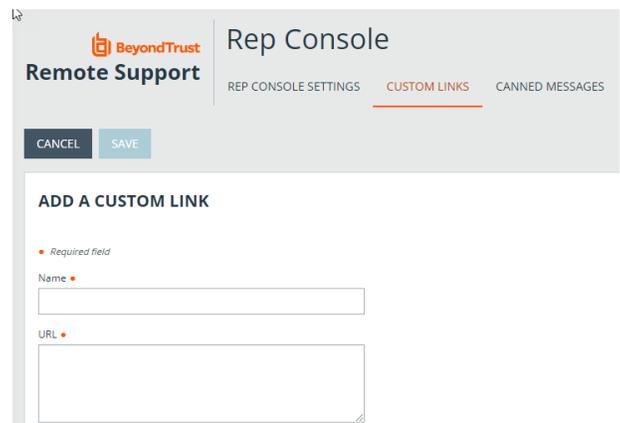
1. Navigate to **/login > Management > Outbound Events**.
2. In the **HTTP Recipients** section, click **Add** and name it *Jira Integration* or something similar.
3. Enter the Outbound Event **URL** for the web trigger. This was displayed on the Jira Service Management **General Settings** screen.
4. Scroll to **Events to Send** and check the following events:
  - **Support Session End**
  - **Customer Exit Survey is Completed**
  - **Representative Survey is Completed**
  - (Optional). **Someone Joins a Support Session**
5. Click **Save**.
6. The list of outbound events now 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.



 **Note:** The *Someone Joins a Support Session* event is optional. This event is needed only when using the **Auto-Create** functionality.

## Create Custom Link

Under **Rep Console > Custom Links**, click **Add** to create a new custom link: **URL: https://<jira-environment>/browse/%SESSION.CUSTOM.EXTERNAL\_KEY%**, replacing **<jira-environment>** with the hostname of your JIRA Service Management instance.



## Use Cases

### 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 issue.

### Import BeyondTrust Session Data into an Issue

Once the support session ends, the issue is automatically updated with information gathered during the session. The following information is posted as an internal note to the issue:

- Summary
- Customer
- Rep(s)
- Chat
- File Transfers
- Session Notes
- Recording Links
- Exit Surveys (Customer and Rep)

### Access an Issue from the Representative Console

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

### Auto-Issue Creation

For previously unreported issues or questions, the end user can submit a simple issue description to immediately begin a support session. Meanwhile, the integration takes the submitted information from the session and creates a new Service Desk issue. This saves time and unnecessary steps for the end user and support staff.

### Auto-Issue State Transition

Based on a specific customer or representative exit survey response, the integration can transition the issue to a specific state. For instance, if the rep survey contains a question asking whether the issue was resolved as part of the Remote Support session, when the representative responds appropriately, the issue can be closed.