BeyondTrust

Remote Support
BMC Remedyforce Integration

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BeyondTrust Remote Support Integration with BMC Remedyforce

IMPORTANT!

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

Service desks and customer support organizations using BMC Remedyforce 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 Remedyforce.

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

- A BeyondTrust support session can be initiated from the BMC Remedyforce interface. This session is linked to the incident in BMC Remedyforce.
- At the end of a session, the incident or change request can be updated with the following information:
  - **Chat Transcript** (including files transferred, special actions, and other events)
  - **System Information** (General section plus other select details such as disk, memory, and network)
  - **Session Notes**
  - **Surveys** (customer and representative)

Prerequisites for the BeyondTrust Remote Support Integration with BMC Remedyforce

Outlined below are requirements for the enterprise versions of the BeyondTrust integration with BMC Remedyforce. If any of the integration requirements are not yet met, they must be in place prior to starting the integration setup process unless the associated features of the integration are not required.

Requirements

- BeyondTrust Appliance (physical or virtual) with:
  - BeyondTrust Remote Support: 14.2.x and newer
  - At least one usable representative console which can generate session keys
  - A working BeyondTrust public site through which users can connect to representatives
- Network firewall rules to allow:
  - TCP 443 traffic from the BeyondTrust Appliance to reach the appropriate BMC Remedyforce instance
  - TCP 443 traffic from the appropriate BMC Remedyforce instance to reach the BeyondTrust Appliance
- A working version of the BeyondTrust-Salesforce integration

Firewall Test

It is important to test all requirements of the integration prior to beginning setup. Most of these can be tested by the BeyondTrust and BMC Remedyforce administrators within their respective systems, but to test the network firewall, the BeyondTrust admin should take the following steps to confirm that the necessary rules are in place:

1. Log into a machine either external to the BeyondTrust Appliance's network or in the same VPN as the BMC Remedyforce instance, depending on how BMC Remedyforce connects to the appliance's network.
2. Log into the BeyondTrust Appliance's /appliance interface.
3. Browse to **Support > Utilities :: TCP Connection Test**.
4. Enter the hostname of the BMC Remedyforce instance, enter the port number of **443**, and click **Test**. The result should be a **Connected** status message.

Note: *Do not enter the protocol of the BMC Remedyforce instance (e.g., https://remedyforce.example.com/). Instead, use the fully qualified domain name only (e.g., remedyforce.example.com). In most environments, the BeyondTrust Appliance resides in a DMZ network and has a public DNS address, which BMC Remedyforce contacts over the public internet. In some environments, BeyondTrust is not publicly accessible. In these cases, you should communicate with your technical contact about implementing a VPN connection to your internal network for BMC Remedyforce.*

Configure BMC Remedyforce for Integration with BeyondTrust Remote Support

Install the BeyondTrust-Remedyforce Integration Unmanaged Package

1. Enter the BMC Remedyforce unmanaged package installation URL into a browser, and then click the **Continue** button.

   > ***Note:*** *You can obtain the unmanaged package installation URL from your BeyondTrust technical contact.*

2. Select **Do Not Install** as the option for **What if existing component names conflict with ones in this package**.
3. Select **Install for Admins Only** and click the **Install** button.
4. Once you see the **Installation Complete** message, click the **Done** button to return to Salesforce setup.

Add Incident Integration Mappings

This step maps BeyondTrust sessions that are brought into Salesforce.com to the BMC Remedyforce incident.

1. In Salesforce.com, go to **Develop > Custom Settings**, and click the **Manage** link next to the item labeled **Integration Mapping**.
2. Click the **New** button directly above the list of settings. Enter the following values:
   a. **Name**=a2U

      > ***Note:*** *This value is different for each customer. This is the record prefix of the incident. The record prefix can be found by opening the **Incident** tab from within Salesforce.com and creating a new incident or viewing an existing incident.*

   b. **BeyondTrust Field Name**=external_key
   c. **Salesforce Field Name**=Incident__c

      > ***Note:*** *Be sure to check the record prefix to ensure we use the correct one here. You can determine the record prefix by pulling up any incident or change request and getting the record prefix from the URL. Go to the incident in Salesforce (not Remedyforce) and get this value at the end of the URL. This value is different for every customer.*

3. Click the **Save** button.

Add Change Request Integration Mappings

This step maps BeyondTrust sessions that are brought into Salesforce.com to the BMC Remedyforce change request.

1. In Salesforce.com, go to **Develop > Custom Settings**, and click the **Manage** link next to the item labeled **Integration Mapping**.
2. Click the **New** button directly above the list of settings. Enter the following values:
    a. **Name**=a2U

    > ***Note:*** *This value is different for each customer. This is the record prefix of the incident. The record prefix can be found by opening the* ***Incident*** *tab from within Salesforce.com and creating a new change request or viewing an existing incident.*

    b. **BeyondTrust Field Name**=external_key
    c. **Salesforce Field Name**=Change_Request__c

Customize Incident Layout

1. Change your application to BMC Remedyforce. You should see a button for this in the upper-right of the screen.
2. Click the **+** next to the tabs in the main tab strip toward the top of the screen.
3. Click the **Incidents** link. When the list of incidents renders, click to view a specific incident.
4. Click **Edit Layout**.

> ***Note:*** *In production, you may want to take the following steps on a specific layout other than the standard incident layout.*

5. Drag the **BeyondTrust Session Key** button and **BeyondTrust Jump To CI** button to the custom buttons area.
6. Drag the **BeyondTrust Sessions** related list to the **Related Lists** section.
7. Click the wrench and do the following:
    a. Add **primary customer**, **primary rep**, **start time**, **end time**, and **duration**.
    b. Sort by **start time, descending**.
    c. Click **OK**.
    d. Click **Save**.
8. If you are prompted to select standard buttons to show, uncheck the **New** button.

Customize Change Request Layout

1. Change your application to BMC Remedyforce. You should see a button for this in the upper-right of the screen.
2. Click the **+** next to the tabs in the main tab strip toward the top of the screen.
3. Click the **Change Requests** link. When the list of change requests renders, click to view a specific change request.
4. Click **Edit Layout**.

> ***Note:*** *In production, you may want to take the following steps on a specific layout other than the standard change request layout.*

5. Drag the **BeyondTrust Session Key** button and **BeyondTrust Jump To CI** button to the custom buttons area.

6. Drag the **BeyondTrust Sessions** related list to the **Related Lists** section.
7. Click the wrench and do the following:
    a. Add **primary customer**, **primary rep**, **start time**, **end time**, and **duration**.
    b. Sort by **start time, descending**.
    c. Click **OK**.
    d. Click **Save**.
8. If you are prompted to select standard buttons to show, uncheck the **New** button.

Add Incident Custom Actions

1. Click the **Remedyforce Administration** tab, and then go to **Application Settings > Consoles**.
2. Ensure **Incidents/Service Requests** is selected as the console view, and then click the **Customize Menu** button located on the right side of the screen.
3. Click the **Custom Actions and Agent Tools** link. Make sure **Actions** is selected in the menu.
4. Add a new custom action with the following values:
    a. **Name**=Jump To CI
    b. **Description**=BeyondTrust Jump To CI
    c. **Launch URL**=../apex/JumpToCI
5. Add a launch parameter with the following values:
    a. **Parameter Name**=incident_id
    b. **Parameter Value**=Record ID
    c. **Launch In**=Browser tab
6. Add another new custom action with the following values:
    a. **Name**=Generate Session Key
    b. **Description**=BeyondTrust Generate Session Key
    c. **Launch URL**=/apex/BGIntegration__GenerateSessionKeyHandler
7. Add a launch parameter with the following values:
    a. **Parameter Name**=external_key
    b. **Parameter Value**=Record ID
    c. **Launch In**=Browser tab
8. Click the save icon located in the middle-left of the screen.
9. Click the **Remedyforce Administration** tab, and then go to **Application Settings > Consoles**.
10. Ensure **Incidents/Service Requests** is selected in the console view.
11. Click **BeyondTrust Profile** in the **For Selected Profiles** section.
12. Select the appropriate layout and ensure **Jump To CI** and **Generate Session Key** are both checked.
13. You may need to ensure that the user profile is one to which you have added the **BeyondTrust Generate Session Key** and **BeyondTrust Jump To CI** menu items.

Add Change Request Custom Actions

1. Click the **Remedyforce Administration** tab, and then go to **Application Settings > Consoles**.
2. Ensure **Change Requests** is selected as the console view, and then click the **Customize Menu** button located on the right side of the screen.
3. Click the **Custom Actions and Agent Tools** link. Make sure **Actions** is selected in the menu.
4. Add a new custom action with the following values:
    a. **Name**=Jump To CI
    b. **Description**=BeyondTrust Jump To CI
    c. **Launch URL**=../apex/JumpToCI
5. Add a launch parameter with the following values:
    a. **Parameter Name**=incident_id
    b. **Parameter Value**=Record ID
    c. **Launch In**=Browser tab
6. Add another new custom action with the following values:
    a. **Name**=Generate Session Key
    b. **Description**=BeyondTrust Generate Session Key
    c. **Launch URL**=/apex/BGIntegration__GenerateSessionKeyHandler
7. Add a launch parameter with the following values:
    a. **Parameter Name**=external_key
    b. **Parameter Value**=Record ID
    c. **Launch In**=Browser tab
8. Click the save icon located in the middle-left of the screen.
9. Click the **Remedyforce Administration** tab, and then go to **Application Settings > Consoles**.
10. Ensure **Change Requests** is selected in the console view.
11. Click **BeyondTrust Profile** in the **For Selected Profiles** section.
12. Select the appropriate layout and ensure **Jump To CI** and **Generate Session Key** are both checked.
13. You may need to ensure that the user profile is one to which you have added the **BeyondTrust Generate Session Key** and **BeyondTrust Jump To CI** menu items.

Test the Integration between BMC Remedyforce and BeyondTrust Remote Support

The following steps take place in Salesforce.com and BeyondTrust and are provided to ensure that the integration works properly. Troubleshooting suggestions are provided with each step in case of failure.

Test Session Key Generation

1. Log into Salesforce.com and select the BMC Remedyforce app from the menu on the right side of the screen.
2. Click the **Remedyforce Console** tab and click an incident number to open it.
3. Click the **Generate Session Key** link under the **Actions** or **Agent Tools** menu.
4. Once the **Generate Session Key** button is clicked, a screen displays that contains a session key, a session URL, and an email button in the BeyondTrust representative console (for the URL approach). In case of failure:
    a. Ensure that the Salesforce user account is mapped to a BeyondTrust user account.
    b. Make sure that TCP port 443 is allowed from Salesforce (in the Cloud) to the BeyondTrust Appliance (typically the DMZ).
    c. In Salesforce, make sure the correct BeyondTrust values are supplied in the configuration tab.

Test BeyondTrust Session Import

1. Use the session URL or session key generated from the previous test section to start a BeyondTrust session.
2. Ensure that you are logged into the representative console. Once the session is started, send a chat message or two, enter a session note, and then end the session.
3. Log into the BeyondTrust /login interface and go to **Management > Outbound Events**.
4. Ensure that the status column for the HTTP recipient reads OK and does not display an error message. Below are various errors that may appear in the status column.
    a. **Connection timed out** - This usually means the outbound event never made it to its destination. Use the BeyondTrust /appliance TCP port tester utility or try to telnet to Salesforce on the appropriate port to see if communication is blocked.
    b. **A 400 or above error was received** - This usually means that the BeyondTrust site created in Salesforce does not have the BGIntegration.SessionUpdateHandler Visualforce Page.
    c. **Connection refused** - This usually means that network communication is clear, but the destination server has a firewall rule in place or a port is being blocked for incoming requests.
5. Once there are no errors in the BeyondTrust outbound event, you can log into Salesforce as a representative and open the case from which the session key was generated.
6. You will see a list of BeyondTrust sessions. There should be a row listed for the session you just ran. Note that there could be many sessions listed, so ensure that you are looking at the session you just ran.
7. BeyondTrust sessions generally show up in Salesforce within one minute. However, if there is something delaying the outbound event from posting to Salesforce, it could take longer. If the session does not show up in Salesforce, check the **Salesforce Error Logs** tab to see if there is an error that is keeping the BeyondTrust Session from posting to Salesforce.

