Remote Support

ServiceNow Basic Integration
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ServiceNow Basic Integration with BeyondTrust Remote Support

Service desks and customer support organizations using ServiceNow can integrate with BeyondTrust Remote Support to improve service levels, centralize support processes, and strengthen compliance. Features of the BeyondTrust Remote Support and ServiceNow integration are summarized below.

- **Outbound Support Sessions**: Technicians can launch Remote Support sessions from within ServiceNow Incidents using the Generate Session Key button.
- **Session Updates**: Remote Support session chat transcripts are written back to ServiceNow and are associated with the Incidents from which they were started.
Requirements for the ServiceNow Basic Integration with BeyondTrust

Outlined below are requirements for the basic version of the BeyondTrust Remote Support ServiceNow integration. 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.

**Base Integration Requirements**

- ServiceNow instance with:
  - Version London or later
  - A working Service Desk application
  - A working email configuration

- BeyondTrustRemote Support:
  - Version 17.x or later
  - At least one usable representative console which can generate session keys
  - A working Remote Supportpublic site through which users can connect to representatives

- Network firewall rules to allow:
  - TCP 443 traffic from the Secure Remote Access Appliance to reach the appropriate ServiceNow instance
  - TCP 443 traffic from the appropriate ServiceNow instance to reach the Secure Remote Access Appliance
  - Optionally, ServiceNow MID Servers can be used for this integration.

For more information on MID Servers, please see https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/product/mid-server/concept/c_MIDServerConfiguration.html.

**Firewall Test**

It is important to test all requirements of the integration prior to beginning setup. Most of these can be tested by the Remote Support and ServiceNow 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 Secure Remote Access Appliance's network or in the same VPN as the ServiceNow instance, depending on how ServiceNow is connecting to the appliance's network.
3. Browse to Support > Utilities :: TCP Connection Test.
4. Enter the hostname of the ServiceNow 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 ServiceNow instance (e.g., https://servicenow.example.com/). Instead, use the fully qualified domain name only (e.g., servicenow.example.com). In most environments, the Secure Remote Access Appliance resides in a DMZ network and has a public DNS address which ServiceNow contacts over the public internet. In some environments, BeyondTrust is not publicly accessible. In these cases, you should contact ServiceNow about implementing a VPN connection to your internal network for ServiceNow. Please see Setting Up a Virtual Private Network between ServiceNow and a Business Network at https://docs.servicenow.com/bundle/jakarta-platform-administration/page/administer/encryption/concept/c_SetUpAVPN4SNowBusNet.html.
Configure BeyondTrust Remote Support for the ServiceNow Basic Integration

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 That the API Is Enabled

The Remote Support Integration requires the Remote Support XML API to be enabled. This feature is used from within the integrating software to communicate with the Remote Support APIs.

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

Create a ServiceNow OAuth API account

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

1. Go to /login > Management > API Configuration.
2. Click Add to create a new API account and name it ServiceNow or something similar.
3. Set Command API to Full Access.
4. Under Reporting API, check all options.
5. The OAuth Client ID and OAuth Client Secret are used during the OAuth configuration step in ServiceNow. Make note of these and store them in a secure location.
6. Click Save.
Configure ServiceNow for Basic Integration with BeyondTrust Remote Support

Unless otherwise noted, all of the steps in this section take place in the ServiceNow interface. The development and/or test instances of ServiceNow should be used initially so that the integration can be thoroughly tested before installation in the production instance.

Install Remote Support Integration

Installing the Remote Support Integration involves requesting the Remote Support ServiceNow Integration from the ServiceNow Store.

Please see ServiceNow's FAQ regarding app installation via the ServiceNow App Store.

- ServiceNow Store: https://store.servicenow.com
- ServiceNow Store FAQ: https://store.servicenow.com/appStoreAttachments.do?doc_type=store_faq&inline=true

Create Local Update Set

Local update sets are used in ServiceNow to capture configuration changes. They can be used to quickly transfer these configuration changes to other environments.

1. Browse to System Update Sets > Local Update Sets, and click the New button above the list of update sets to create a new local update set.
2. In the Name field, enter BeyondTrust - ServiceNow Integration Configuration (or an equivalent).
3. Click Submit and Make Current. This update set will capture any changes you make during the configuration process. Just make sure that the BeyondTrust - ServiceNow Integration Configuration update set is selected in ServiceNow's update set dropdown for the following steps.
4. Make sure the Application is set to BeyondTrust Remote Support Enterprise Integration. If it is not, use the settings in the upper right of the screen to switch to the aforementioned scope.
5. After configuration is complete and tested, the local update set can be imported or promoted to new instances of ServiceNow (e.g., the production instance) to quickly replicate the integration. This must be done after transferring the BeyondTrust - ServiceNow retrieved update set.

For more information, please see "Transfer the Remote Support-ServiceNow Basic Integration Update Sets" on page 12.
Configure Remote Support Properties

Remote Support properties allow the integration to connect ServiceNow with a Secure Remote Access Appliance.

1. Browse to BeyondTrust Integration.
2. Click Properties.
   - **Hostname of the Secure Remote Access Appliance**: The hostname or IP address of your BeyondTrust site. This determines the address which ServiceNow will use for outbound access to BeyondTrust. An example of this access is when a user in ServiceNow clicks the BeyondTrust Session Key button. ServiceNow will then make an outbound connection to the Secure Remote Access Appliance in order to retrieve the key.
   - **OAuth Client ID**: The client id for the authentication account that was setup in BeyondTrust.
   - **OAuth Secret**: The secret for the authentication account that was setup in BeyondTrust.
   - **Enable the ability to Generate a BeyondTrust Session Key from an incident**: If checked, users can generate a BeyondTrust Session Key from within a ServiceNow incident.
   - **Enable pulling sessions into ServiceNow from BeyondTrust**: If checked, BeyondTrust sessions will be imported into ServiceNow at the end of sessions that are initiated from within ServiceNow.

Configure Remote Support Session Related Lists

Related lists are used in ServiceNow, in this case, to provide a list of Remote Support Sessions that are associated with an Incident.

1. Browse to Incident.
2. Click Open to see a list of open incidents.
3. Select an incident by clicking the Incident Number.
4. Right-click the Incident title bar and select Configure > Related Lists.
5. Ensure that Session > Incident has been moved to the Selected column.
6. Click the Save button.
7. The BeyondTrust Sessions list should appear towards the bottom the incident form once these steps are complete.
Configure Incident States

Incident states are used in the Remote Support Integration, specifically UI Actions (like Generate Session Key) to control when the button shows up on incident forms.

1. Browse to Incident.
2. Click Open to see a list of open incidents.
3. Select an incident by clicking the Incident Number.
4. Right-click on the Label State, and select Show Choice List.
5. Filter the list by Table=incident. Take note of the different incident choices, specifically the value of incidents with a label of Resolved or Closed and any custom incident states for which BeyondTrust Session Key should not appear.
6. Go back to the incident and right-click on the BeyondTrust Session Key button located in the Incident title bar.
7. Select Configure > UI Actions.
8. In the UI Actions list, click BeyondTrust Session Key.
9. Focus the Condition field and ensure current.incident_state is configured to include the IDs of the incident states for which the session key button should not appear.
10. If the Resolved and Closed fields you took note of earlier have values of 6 and 7, then the Condition field mentioned above should include the code current.incident_state < 6 so as not to show a Remote Support Session Key button on resolved or open incidents. If there are custom incidents (e.g., Complete), then the condition field may require logic such as && current.incident_state != 8.

For example, if the button should not appear for incident states 6, 7, and 10, while it should appear for states 1-5, 8, and 9, then the following could be used: gs.hasRole('itil') && current.incident_state != 6 && current.incident_state != 7 && current.incident_state != 10.

Configure Remote Support Username and Authentication

1. Log into your BeyondTrust /login interface with the same credentials as a ServiceNow user who is expected to be using BeyondTrust.
2. Download and install a BeyondTrust representative console from the /login > My Account tab.
3. If login fails, make sure that BeyondTrust and ServiceNow are checking credentials against the same LDAP server(s), if appropriate. Check the LDAP server in the BeyondTrust interface under /login > Users & Security > Security Providers. To check the LDAP server for ServiceNow, see the LDAP Integration Setup article at https://docs.servicenow.com/bundle/jakarta-platform-administration/page/integrate/ldap/concept/c_LDAPIntegrationSetup.html.
Set Up Scheduled Job

1. Browse to System Definition > Scheduled Jobs.
2. Click the New button at the top of the list.
3. Click the link titled Automatically run a script of your choosing.
4. Provide the following values:
   a. Name: Import BeyondTrust Sessions
   b. Run: Periodically
   c. Repeat Interval: 5 minutes
   d. Run this script: (new x_bmgr_bomgar_inte.Bomgar()).pullPendingBomgarReports();
5. Click Submit to save the job.

Assign Users Appropriate Roles

ITIL users who will provide technical support using this integration should be given the x_bmgr_bomgar_inte.itil role.

Note: You need to elevate the admin's role in order to make the following change.

1. Browse to User Administration > Users.
2. Select a user, then find the Roles tab and click the Edit... button.
3. Add the x_bmgr_bomgar_inte.itil role from the Collection list to the Roles list
4. Click the Save button.

ServiceNow MID Server Option

It is possible to avoid direct connection between ServiceNow and Remote Support by using an MID server for internal Remote Support deployments.

For more information on MID servers, please see https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/product/mid-server/concept/c_MIDServerConfiguration.html.
Test the Setup of the Remote Support and ServiceNow Basic Integration

The following steps take place in ServiceNow and BeyondTrust Remote Support are provided to ensure that the integration is working properly. Troubleshooting suggestions are provided with each step in case of failure.

Test Session Key Generation

1. Log into the Remote Support representative console, and then log into ServiceNow with the same account. If Remote Support and ServiceNow use different authentication systems, manually assign your Remote Support user to your ServiceNow user as described in "Configure Remote Support Username and Authentication" on page 9.

2. Open a closed incident in ServiceNow, open a resolved incident, and make sure the Remote Support Session Key button does not appear for either of them.

3. Open a test incident in ServiceNow. Confirm the State field matches one of the values for which the Remote Support Session Key button should appear, and make sure the button appears as expected. Remember that the incident must be saved before the button will appear.

4. Under BeyondTrust > Integration > Properties, click the BeyondTrust Session Key button. This launches the BeyondTrust representative console, subsequently opening the Session Key dialog box.

Test Remote Support Session Import

1. Log into ServiceNow as an ITIL user or an admin.

2. Use the Remote Support Session Key button as described above to start a Remote Support session.

3. End the session from the representative console and close any surveys and/or session end messages on the representative and/or customer sides of the session.

4. Give the scheduled job you created earlier enough time to run, and then refresh the ServiceNow incident from which the session key was generated, scroll to the bottom of the page, and check the Remote Support Sessions list. There should be an entry for the recent session. If not, make sure the following are true:
   a. The API User Connection test works correctly as described above.
   b. There are no Remote Support errors reported for your ServiceNow instance in the Remote Support Outbound Events list. Your Remote Support admin can check this in Remote Support from the /login web interface under Management > Outbound Events.
Transfer the Remote Support-ServiceNow Basic Integration Update Sets

The steps below are typically used after the integration has been imported and configured in a test/development instance of ServiceNow and is being transferred to a production instance. However, they are also applicable to transferring the integration between any ServiceNow instances.

**Transfer Update Set**

1. Follow the steps in the ServiceNow documentation to transfer the Remote Support - ServiceNow Integration update set(s) into the destination instance of ServiceNow.

   **Note:** *This is typically done by retrieving the update sets from the destination instance or by exporting the update sets from the original instance as XML files. For more details, please see Transferring Update Sets in the ServiceNow product documentation, at [https://docs.servicenow.com/bundle/jakarta-application-development/page/build/system-update-sets/reference/update-set-transfers.html](https://docs.servicenow.com/bundle/jakarta-application-development/page/build/system-update-sets/reference/update-set-transfers.html).*

2. Follow the same steps to transfer the Remote Support - ServiceNow Integration Configuration update set.
ServiceNow Basic and BeyondTrust Remote Support Integration Use Cases

Service desk and customer support organizations using ServiceNow Basic can integrate with BeyondTrust Remote Support to improve service levels, centralize support processes, and strengthen compliance. Use cases addressed by the Remote Support and ServiceNow Basic integration are listed below.

- Generate Session Key
- Import Remote Support Session Chat Transcript into ServiceNow Basic

Generate Session Key

From within an incident, technicians can generate a session key for a customer to initiate a support session.

Once the session ends, a detailed report of the session is imported into ServiceNow Basic and becomes associated with the incident from which the session key was generated.

Import Remote Support Session Chat Transcript into ServiceNow Basic

Once the Remote Support session ends, the ServiceNow incident is automatically updated with a chat transcript gathered during the session.
ServiceNow Basic and BeyondTrust Integration Network Diagrams

ServiceNow Basic Integration Network Diagram

[Diagram showing integration between ServiceNow and BeyondTrust Enterprise Remote Support with HTTPS over 443 connection]
ServiceNow Basic Integration Mid Server Network Diagram