



BeyondTrust

Remote Support ServiceNow Basic Integration

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Integrate ServiceNow ITSM Basic 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. Full details, how to obtain and install the integration, and implementation instructions are covered in this guide.

- **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.

i *The ServiceNow ITSM Basic Integration is available for free. For more information on obtaining the integration, please see ["Configure ServiceNow for Basic Integration with BeyondTrust Remote Support"](#) on page 7.*

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.

Review Base Integration Requirements

A current version of a ServiceNow release, including:

- A working Customer Service Management application
- A working email configuration

A current release of BeyondTrust Remote Support including:

- At least one usable representative console capable of generating session keys
- A functional Remote Support site through which users can connect to representatives

To configure network firewall rules for this integration, do the following:

- Allow TCP 443 traffic from the B Series Appliance to the appropriate ServiceNow instance.
- Allow TCP 443 traffic from the appropriate ServiceNow instance to the B Series Appliance.
- Optionally, use ServiceNow MID Servers for this integration.



For more information on MID Servers, please see [MID Server Configuration](https://docs.servicenow.com/bundle/utah-servicenow-platform/page/product/mid-server/concept/mid-server-landing.html) at <https://docs.servicenow.com/bundle/utah-servicenow-platform/page/product/mid-server/concept/mid-server-landing.html>.

Test the Firewall

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 in to a machine either external to the B Series Appliance's network or in the same VPN as the ServiceNow instance, depending on how ServiceNow is connecting to the B Series Appliance's network.
2. Log in to the B Series Appliance's **/appliance** interface.
3. Browse to **Support > Utilities :: TCP Connection Test**.
4. Enter the hostname of the ServiceNow instance, enter the port number of **443**, and then click **Test**. A successful result is a *Connected* status message.



Note: Do not enter the protocol when entering the ServiceNow instance (<https://servicenow.example.com>, for example). Instead, use only the fully qualified domain name (servicenow.example.com). In most environments, BeyondTrust Remote Support resides in a DMZ network and has a public DNS address which ServiceNow contacts over the public internet. In some environments, Remote Support is not publicly accessible. In these cases, contact ServiceNow about implementing a VPN connection to your internal network for ServiceNow. For more information, please see [Virtual Private Network \(VPN\) at \[https://docs.servicenow.com/bundle/utah-platform-security/page/administer/encryption/concept/c_SetUpAVPN4SNowBusNet.html\]\(https://docs.servicenow.com/bundle/utah-platform-security/page/administer/encryption/concept/c_SetUpAVPN4SNowBusNet.html\)](https://docs.servicenow.com/bundle/utah-platform-security/page/administer/encryption/concept/c_SetUpAVPN4SNowBusNet.html).

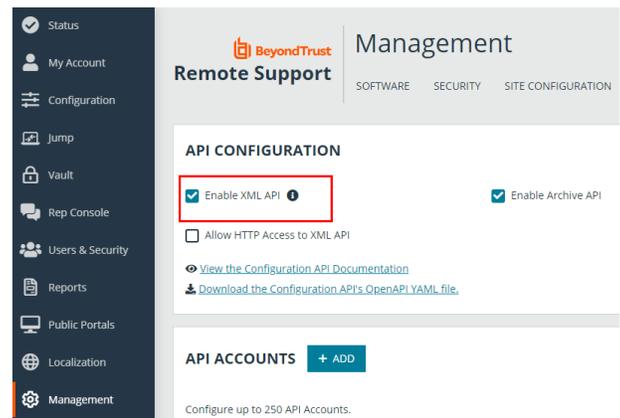
Configure BeyondTrust Remote Support for the ServiceNow Basic Integration

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 B Series Appliance followed by **/login** (e.g., <https://support.example.com/login>).

Verify 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.

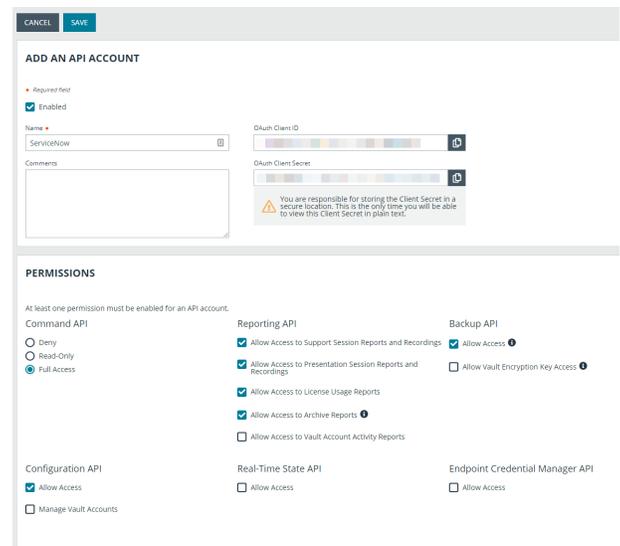
Go to **/login > Management > API Configuration** and verify that **Enable XML API** is checked.



Create a ServiceNow OAuth API Account

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

1. Go to **/login > Management > API Configuration**.
2. Click **Add** to create a new API account. 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. We recommend that you initially use development or test instances of ServiceNow before installation in the production instance, so that the integration can be thoroughly tested.

Install BeyondTrust Integration

The Integration must be obtained directly from BeyondTrust. After it is obtained, it is installed via the ServiceNow Store. There is no mechanism to obtain the integration at the ServiceNow Store. Follow the steps below to request and install the integration.

1. Log in to your ServiceNow platform with your corporate account. Please contact your company Now Support (HI) admin if you do not have credentials.
2. Search for BeyondTrust Remote Support Basic Integration, or [go to the app's page](https://store.servicenow.com/sn_appstore) at https://store.servicenow.com/sn_appstore



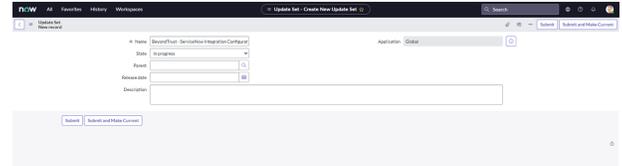
[store.do#!/store/application/6e5427ae4faa3100237ca5017310c7d9/](https://store.servicenow.com/sn_appstore_store.do#!/store/application/6e5427ae4faa3100237ca5017310c7d9/).

3. Click **Request App**.
4. Request Remote Support Basic.
5. Within a business day, BeyondTrust approves the request with a \$0 purchase price, and sends a copy of these installation instructions to the requester.
6. Once you receive the confirmation, return to the app's page in the ServiceNow store.
7. Click **Complete Purchase**.
8. Review the contract details.
9. If you agree, check **Accept the Site Terms of Use**.
10. Click **Complete Purchase**.
11. The app is ready for installation on your ServiceNow instance(s).
12. Repeat the steps below for each instance.
13. Login to the ServiceNow instance on which you want to install the app.
14. Navigate to **System Applications > All Available Applications > All**.
15. Search for the app you want to install.
16. Click **Install**.

i For more information on installing applications, please see [ServiceNow's Help Page](https://store.servicenow.com/sn_appstore_store.do#!/store/helpcenter) at https://store.servicenow.com/sn_appstore_store.do#!/store/helpcenter.

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 captures 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 14.](#)

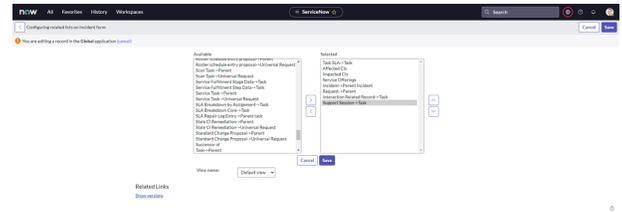
Configure Remote Support Properties

Remote Support properties allow the integration to connect ServiceNow with a B Series Appliance.

1. Browse to **BeyondTrust Integration**.
2. Click **Properties**.
 - **Hostname of the BeyondTrust Appliance B Series:** 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 B Series 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 of the incident form once these steps are complete.

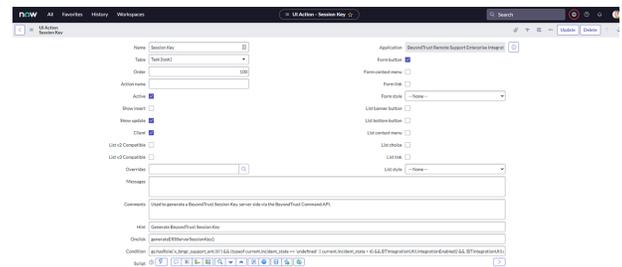
Configure Incident States

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.



Name	State	Active	Search	Label	Role	Updated
Incident	State	on	1	New	None	2019-12-20 20:29:40
Incident	State	on	3	In Progress	None	2019-12-20 20:29:40
Incident	State	on	5	Completed	None	2019-12-20 20:29:40
Incident	State	on	7	Resolved	None	2019-12-20 20:29:40
Incident	State	on	9	Closed	None	2019-12-20 20:29:40

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 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 can be used: **gs.hasRole('itil') && current.incident_state != 6 && current.incident_state != 7 && current.incident_state != 10**.

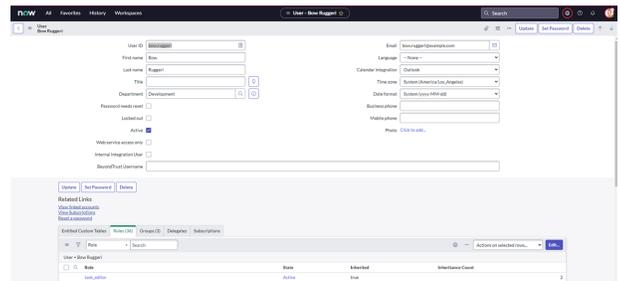
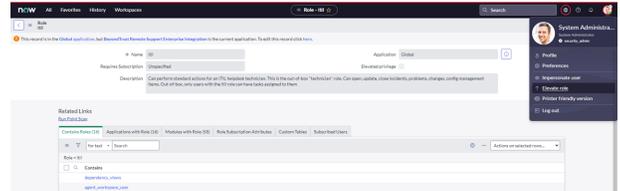
Assign Users Appropriate Roles

Give ITIL users who will provide technical support using this integration 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.

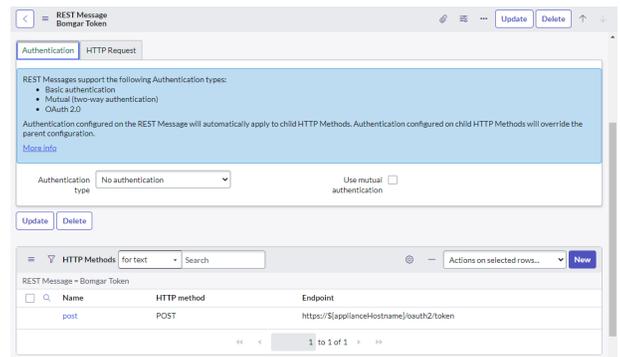


Use ServiceNow MID Server Option

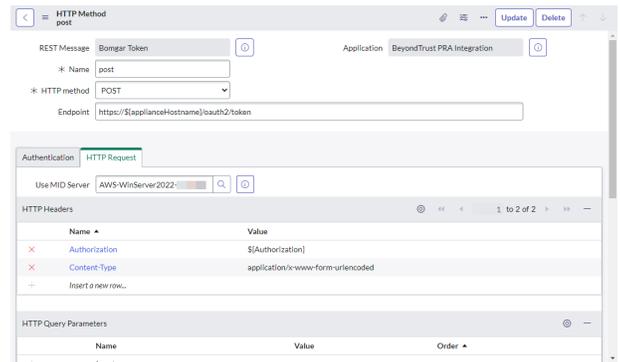
It is possible to avoid direct connection between ServiceNow and Remote Support by using a MID server for internal Remote Support deployments.

To configure the integration to use a MID server for API requests to a Remote Support site, specify the MID server to use on the individual outbound REST messages:

1. In ServiceNow, navigate to **System Web Services > Outbound > REST Message**.
2. Filter to show only messages for the BeyondTrust application being configured.
3. Click the **Name** of one of the messages to edit its properties.
4. In the **HTTP Methods** related list at the bottom, select the **Name** of the method (typically **post**).



5. On the resulting form, select the **HTTP Request** tab and select your MID server in the **Use MID Server** field.
6. Click **Update** to save the changes.



The screenshot shows the configuration interface for an HTTP Method. The REST Message is 'Bongar Token', the Name is 'post', the HTTP method is 'POST', and the Endpoint is 'https://\$appliance\$hostname/oauth2/token'. Under the Authentication section, the 'Use MID Server' is set to 'AWS-WinServer2022'. The HTTP Headers section contains two entries: 'Authorization' with the value '\$[Authorization]' and 'Content-Type' with the value 'application/x-www-form-urlencoded'.

Repeat these steps for each outbound REST message that is a part of the application.



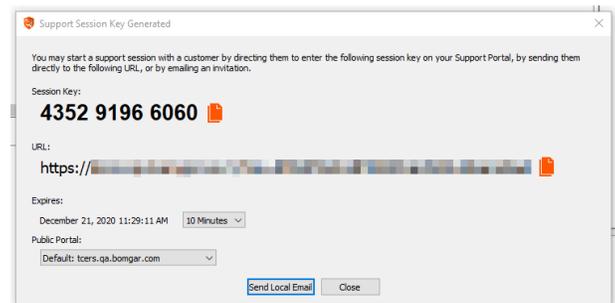
For more information on MID servers, please see [MID Server](https://docs.servicenow.com/bundle/utah-servicenow-platform/page/product/mid-server/concept/mid-server-landing.html) at <https://docs.servicenow.com/bundle/utah-servicenow-platform/page/product/mid-server/concept/mid-server-landing.html>.

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.

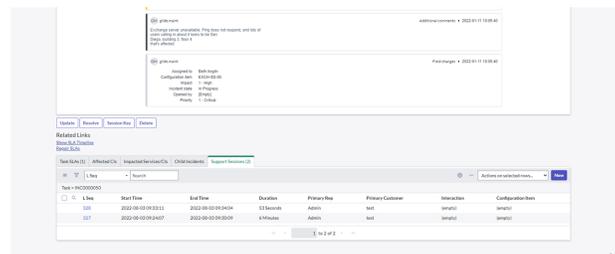
Test Session Key Generation

1. Log in to the Remote Support representative console, and then log in to 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 10](#).
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 in to 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 API User Connection test works correctly as described above.



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 **BeyondTrust - ServiceNow Integration** update set(s) into the destination instance of ServiceNow.



Note: This is typically achieved by retrieving the update sets from the destination instance or by exporting the update sets from the original instance as XML files. For details, please see [Export and Import XML files](https://docs.servicenow.com/bundle/utah-platform-administration/page/administer/development-best-practices/concept/c_ExportAndImportXMLFiles.html) at https://docs.servicenow.com/bundle/utah-platform-administration/page/administer/development-best-practices/concept/c_ExportAndImportXMLFiles.html.

2. Follow the same steps to transfer the **BeyondTrust - ServiceNow Integration Configuration** update set.

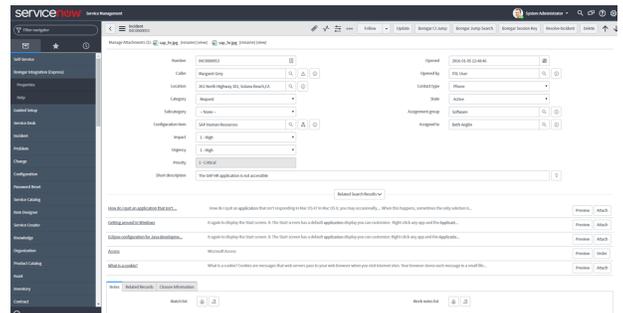
ServiceNow Basic and BeyondTrust Remote Support Integration Use Cases

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

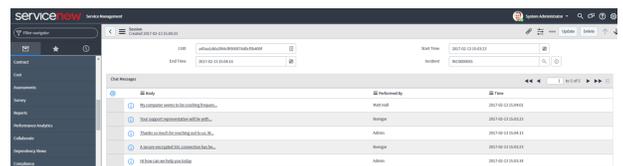
From within an incident, technicians can generate a session key for a customer to initiate a support session.

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.



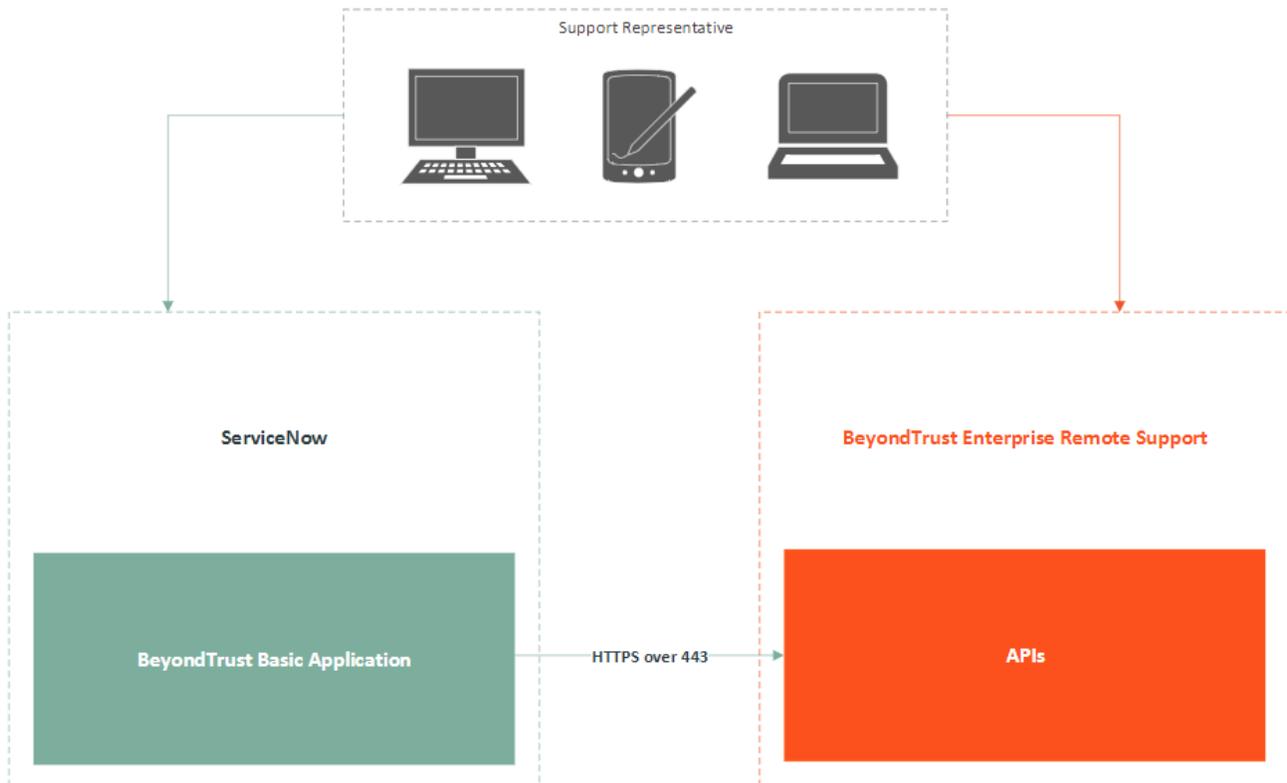
Import Remote Support Session Chat Transcript into ServiceNow Basic

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



ServiceNow Basic Integration Mid Server Network Diagram

