Remote Support
ServiceNow Integration
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BeyondTrust Remote Support Integration with ServiceNow

IMPORTANT!

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

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, Problem Records, Change Requests, Service Catalog Requests, and Call records, using the Generate Session Key button.

- **Session Updates**: Remote Support session data is written back to ServiceNow tickets. The basic integration includes chat transcripts. The enterprise integration includes chat transcripts, file transfers, system information, session notes, customer and representative surveys, session recordings, and more details about each Remote Support session.

- **Customer-Initiated Sessions**: Through the ServiceNow Employee Self Service module, customers can initiate chat sessions with Remote Support representatives from within ServiceNow Incident records.

- **Jump Sessions**: Technicians can connect directly to remote Configuration Items using Remote Jump, Local Jump, RDP, Shell, and/or vPro technology.
Requirements for the Remote Support Integration with ServiceNow

Outlined below are requirements for the enterprise versions of the 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

- BeyondTrust Remote Support:
  - Version 17.x or later
  - At least one usable representative console which can generate session keys
  - A working Remote Support public 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 http://wiki.servicenow.com/index.php?title=MID_Server_Configuration#gsc.tab=0.

Additional Integration Requirements

Note: The enterprise version of BeyondTrust's ServiceNow integration has some additional features which require that certain ServiceNow functions be operational in order to work correctly. If these functions are not set up or actively used, the integration can still be installed and the basic features will work, but the enterprise features will not be usable until the necessary ServiceNow functionality is implemented. This can be done after the initial installation of the integration update set(s), and the additional features should immediately be usable, assuming the appropriate setup steps were taken during the integration setup as described in this guide.

- A working ServiceNow configuration management database (CMDB)
- One or more ServiceNow Configuration Items on which BeyondTrust Jump Client services can be or have been installed
- A working ServiceNow Employee Self Service (ESS) application and portal

The CMDB is used to launch Remote Support sessions based on the hostname of the machine added to the Configuration Item field of an incident. If the CMDB is not populated with any available hosts, BeyondTrust Remote Support Jump clients cannot be used to
remotely access them through ServiceNow's interface. These hosts can be added after the initial setup without making any changes to the integration.

BeyondTrust Remote Support supported operating systems include all of the major modern versions of Microsoft, Apple, and Linux. One or more computers running one of these operating systems must be populated in ServiceNow's CMDB in order for BeyondTrust Remote Support Jump features to work through ServiceNow. As mentioned above, this can be done after initial installation of the integration.

ServiceNow's ESS portal is leveraged by the integration to allow ServiceNow users of the portal to request remote support from logged-in Remote Support representatives. This is not always desired, so some administrators prefer not to use the ESS portal. This is perfectly acceptable for the purposes of installation, and the ESS portal can be deployed after the integration setup to enable the associated Remote Support features.

**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_SetUpVPN4SNNowBusNet.html.
Configure Remote Support for the ServiceNow 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 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 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.
Option 1: Add Outbound Events for Session Import

Outbound events are used to notify ServiceNow that a Remote Support session has finished and is ready to be imported into ServiceNow.

1. Go to /login > Management > Outbound Events.
2. Click Add and name the new HTTP recipient ServiceNow Integration or something similar, depending on your ServiceNow instance.
3. Enter the URL https://support.example.com/api/x_bmgr_support_ent/outbound_event/session_end, where support.example.com is the ServiceNow instance name.
4. Scroll to Events to Send and check the following events:
   - Support Session End
   - Customer Exit Survey is Completed
   - Representative Survey is Completed
5. At the top of the page click Save.

Option 2: Setup Schedule Job for Session Import

Instead of using outbound events to notify ServiceNow that a Remote Support session is ready to be imported, you can use a mechanism in ServiceNow known as a Scheduled Job. Using a scheduled job, you can poll the Remote Support Reporting API for the latest sessions on whichever schedule you like.

To setup a scheduled job, see the section titled Setup Scheduled Job for Session Import in the Configure ServiceNow section of this document.

Set Up the Custom Link

Remote Support custom links can be configured to allow representatives to quickly access the ServiceNow Incident that is associated with the session.

2. Click Add to create a new custom link.
3. Enter a name for the link, and then set the URL to https://support.example.com/nav_to.do?url=task.do?sys_id=%SESSION.CUSTOM.SNOW_TASK_ID%, where support.example.com is the ServiceNow instance name. If needed, you can use any of the available macros to customize the link according to your specifications.

Note: If the customer is using External Key to store the task sys_id, then use the macro %SESSION.CUSTOM.EXTERNAL_KEY% instead.

1. Click Save to save the new link.
Create Custom Fields

Remote Support custom fields are used to map ServiceNow Tasks (incidents, change requests, problem records, and service catalog requests), Call Records, and Configuration Items to Remote Support sessions.

1. Browse to Configuration > Custom Fields.
2. Click Add to create a new custom field.
3. Enter the following values:
   - Display Name: ServiceNow Task ID
   - Code Name: snow_task_id
   - Show in Rep Console: checked
4. Click Save to save the new field.
5. Repeat these steps for the following custom field values:
   - Display Name: ServiceNow Configuration Item ID
   - Code Name: snow_cmdb_ci_id
   - Show in Rep Console: checked
6. And again for the following custom field values:
   - Display Name: ServiceNow Call ID
   - Code Name: snow_call_id
   - Show in Rep Console: checked
Configure ServiceNow for Integration with 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

Customers have two options for installing the Remote Support ServiceNow Integration. The first option involves importing the Remote Support ServiceNow Integration Update Set. The second option involves requesting the Remote Support ServiceNow Integration from the ServiceNow Store.

Install via Update Set

1. Log into ServiceNow with an administrative user account and browse to System Update Sets > Retrieved Update Sets.
2. Click Import Update Set from XML at the bottom of the page. In some instances, it may be necessary to right-click the header column of the update sets table and select Import Update Set from XML from the resulting menu.
3. Click Browse, locate the update set XML file, and click Upload. Remote Support Technical Support normally sends the necessary update set XML file via email after the ServiceNow integration has been purchased through BeyondTrust's Sales team. If you have not yet received a copy, please contact BeyondTrust Technical Support.
4. Find the update set you just imported in the list of retrieved update sets and click it. The name should be similar to BeyondTrust Remote Support 1.0.12 Full, and its Loaded date should be the most recent in the list.
5. Click Preview Update Set to check for errors. Look through each update set.
6. If the preview is satisfactory, return to the main page of the update set and click Commit Update Set.

Install via App 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 cog 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. See "Transfer the BeyondTrust-ServiceNow Integration Update Sets" on page 24 for details.

Update BeyondTrust Session Event Types

Event Types are used to control which Remote Support events are processed with a Remote Support Session import. This step updates the database with all the available event types.

2. This loads all the available Remote Support Session Event Types into the database, so that unwanted events can be filtered out in a subsequent step when setting up your appliance(s).

Note: Clicking the link again will not duplicate records and will show that zero event types were inserted.
Set Up Secure Remote Access Appliance

Secure Remote Access Appliances are set up in ServiceNow to connect ServiceNow with a Secure Remote Access Appliance.

2. Click New to add a new Secure Remote Access Appliance and enter the following values:
   a. Name: Must be Default.
   c. OAuth Client ID: The OAuth client ID that is used to authenticate to the Secure Remote Access Appliance. This is obtained in a previous step, "Create a ServiceNow OAuth API Account" on page 8.
   d. OAuth Client Secret: The OAuth client secret that is used to authenticate to the Secure Remote Access Appliance. This is obtained in a previous step, "Create a ServiceNow OAuth API Account" on page 8.
   e. Integration Enabled: Turns the integration on and off.
   f. Import External Sessions: If checked, session reports for sessions that are started external to ServiceNow are imported into ServiceNow.
   g. Outbound Event Token: The token that is used as an added security measure to confirm outbound events are coming from the appliance that is sending the same token. If left blank, this outbound event token process is ignored. If a value is provided, however, the same value must be sent from all outbound events coming from BeyondTrust as a parameter named outbound_event_token.
   h. Accepted IP Addresses: A comma-separated list of IP addresses from which this integration accepts outbound events.
   i. Auto Associate With User: If checked, when the session report is imported, the integration attempts to associate a ServiceNow User with the session. The lookup is based on the session's primary representative username.
   j. Use Rep Console for Session Keys: If checked, session keys are provided by the Remote Support representative console; otherwise, session keys are provided within ServiceNow.
   k. Work Note Logging
      i. Log Session Notes: If checked, session notes are logged to the task's work notes field.
      ii. Log Session End: If checked, a session end notice is logged to the task's work notes field.
      iii. Log Generate Session Key: If checked, a work note is logged each time a technician generates a session key.
      iv. Log Customer Initiated Sessions: If checked, a work note is logged each time a user starts a session with a technician from the employee self-service module.
   l. Employee Self Service
      i. Issues: A list of issues, each of which must match a Remote Support issue by Code Name, that are presented to customers in the employee self-service module.

Note: In a subsequent step, you have the option to load these from the Secure Remote Access Appliance with the click of a button.
ii. **Self Service Enabled:** If checked, a Get Support Now button is displayed on the Incident form that customers in the employee see in the self-service module.

iii. **Session Start Type:** Determines how to start a Remote Support session, either by click-to-chat or a full session, for customers requesting support in the employee self-service module.

m. **Miscellaneous**

i. **Events to Import:** A list of BeyondTrust session events to process when importing a BeyondTrust session.

研发：You will not be able to configure this setting until after the appliance has been saved.

### Configure Events to Import

Event Types are used to control which Remote Support events are processed with a Remote Support session import. This step defines which events are processed for each Remote Support session import.

1. Browse to **BeyondTrust Remote Support > Appliances.**
2. Click the name of your appliance.
3. Click the **Miscellaneous** tab
4. Click the **Edit Events to Import** button (the lock icon).
5. Click the **Add/Remove multiple** button (the group of people icon) located on the right side of the field.
6. Select the events you want from the **Collection** field on the left and use the arrows to move the events to the **List** field on the right.

研发：You can use **CTRL+A** to select all events.

7. Click the **Save** button when you are finished.

### Configure Self-Service Issues

Issues are used to allow customers to select what type of issue they are having when requesting a session with a Remote Support representative. These issues are mapped to Remote Support issues (set up in /login) and can be used to route Remote Support sessions.

1. Browse to **BeyondTrust Remote Support > Appliances.**
2. Click the name of your appliance
3. Click **Load Issues** in the **Appliance** title bar to auto-load the issues you want from the Secure Remote Access Appliance. You will be alerted with a summary of how many issues were added and/or updated.
4. Optionally, you can manually add Issues to the list by clicking the **Employee Self Service** tab, then double-clicking **Insert a new row...** at the bottom of the list. Double click each column to set the value. Changes are immediately saved when you hit **Enter** or click out of the field.
Configure Journal Entry Table

The Journal Entry table (sys_journal_field), which is used to log chat dialogue and session notes, must be set to allow other scopes to insert records.

1. Browse to System Definition > Tables.
2. Search by Label for Journal Entry.
3. Click on the link titled Journal Entry.

**Note:** If prompted to edit the record in Global scope, do so.

4. Click the Application Access tab.
5. Ensure that the Accessible From field is set to All application scopes.
6. Ensure that Can Create is checked.
7. Click the Update button.

Configure Remote Support Session Related Lists

Related lists are used to provide a list of Remote Support Sessions that are associated with a Task (incident, problem record, change request, or service catalog request), Call Record, or Configuration Item.

**Task Configuration**

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 Support Session > Task has been moved to the Selected column.
6. Click the Save button.
7. The Remote Support Sessions list should appear towards the bottom the incident form once these steps are complete.

**CMDB Configuration**

1. Browse to Configuration > Servers.
2. Click All to see a list of servers.
3. Select a server by clicking the Name of a server.
4. Right-click the Incident title bar and select Configure > Related Lists.
5. Ensure that Support Session > Configuration Item has been moved to the Selected column.
6. Click the Save button.
7. The Remote Support Sessions list should appear towards the bottom the configuration item form once these steps are complete.
Call Configuration

1. Browse to Service Desk.
2. Click My Open Calls to see a list of calls.
3. Select a call by clicking the Number of a call.
4. Right-click the Incident title bar and select Configure > Related Lists.
5. Ensure that Support Session > Call has been moved to the Selected column.
6. Click the Save button.
7. The Remote Support Sessions list should appear towards the bottom the call form once these steps are complete.

Configure Incident Caller Jump Macros

Remote Support Jump technology can be used for unattended access to devices through the Secure Remote Access Appliance.

1. Browse to Incident and click Open to see a list of open incidents.
2. Select an incident by clicking the Incident Number. Populate the Caller field by clicking the Magnifying Glass icon, then selecting an item from the list.
3. Once the Caller is populated, click the Update button on the incident title bar. This takes you back to the incident list. Again, click on the name of the incident you just updated.
4. Right click on the Caller Label and click Configure Dictionary.
5. Locate the Attributes field and take note of the part of the value that reads ref_contributions=task_show_ci_map.
6. Add any of the values listed below as a semicolon separated item in ref_contributions. For example, ref_contributions=bomgar_jump;task_show_ci;show_related_records.
7. Jump To (by caller username, searching the console user field on the pinned device)
   a. x_bmgr_support_ent_bomgar_user_jump
8. Click Update to save your changes.

Configure Task CMDB Jump Macros

Remote Support Jump technology can be used for unattended access to devices through the Secure Remote Access Appliance.

1. Browse to Task and click Open to see a list of open incidents.
2. Select a task by clicking the Task Number. Populate the Configuration Item field by clicking the Magnifying Glass icon, then selecting an item in the list.
3. Once the Configuration Item is populated, click Update on the task title bar. This takes you back to the task list. Again, click on the name of the task you just updated.
4. Right click on the Configuration Item Label and select Configure Dictionary.
5. Locate the Attributes field and take note of the part of the value that reads ref_contributions=task_show_ci_map;show_related_records.
6. Add any of the values listed below as a semicolon separated item in `ref_contributions`. For example, `ref_contributions=bomgar_jump;task_show_ci;show_related_records`.

7. **Jump To**
   a. `x_bmgr_support_ent_bomgar_jump_to`

8. Click **Update** to save your changes.

   **Note:** If the macro icon does not display next to the Configuration Item field when the field is populated with a value, you need to check if there is a Dictionary Override. To do that, follow the steps below.

9. Right click on the Configuration Item Label and click **Configure Dictionary**.
10. Locate the Dictionary Overrides related list. Determine if there is an entry in this list for the type of task you are working with (e.g. `change_request`), and click the item if it exists.
11. If the Override attributes field is checked, then the attributes are being overridden and you'll need to add the macro to the Attributes field.
12. Locate the Attributes field and take note of the part of the value that reads `ref_contributions=task_show_ci_map;show_related_records`.
13. Add any of the values listed above as a semicolon separated item in `ref_contributions`.

**Setup Scheduled Job for Session Import**

1. Browse to **System Definition > Scheduled Jobs** and click **New** at the top of the list.
2. Click the link titled **Automatically run a script of your choosing**.
3. Provide the following values:
   a. **Name**: Import Remote Support Sessions
   b. **Run**: Periodically
   c. **Repeat Interval**: 05 (representing 5 minutes)
   d. **Run this script**: `(new x_bmgr_support_ent.BomgarRemoteSupport ()).pullPendingBomgarReports();`
4. Click **Submit** to save the job.

**Activate the Pull Sessions Module Option**

As a way to test the retrieval of Remote Support sessions and as a means to manually pull Remote Support sessions, we have a module which is inactive by default, but can easily be activated and used.

1. To activate the module, browse to **System Definition > Modules** (not Mobile).
2. Search "for text" with the value "Pull Support Sessions".
3. Click the record titled **Pull Support Sessions**.
4. Find the checkbox labeled **Active**, check the box, and click **Update**.
You should now see the **Pull Support Sessions** link under the **BeyondTrust Remote Support Integration** menu. Clicking this link will only pull sessions which have occurred after the latest session imported into ServiceNow. If no sessions have been imported into ServiceNow, sessions which occurred over the past 24 hours are retrieved.

### 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 **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.

If login fails:

- Make sure that Remote Support and ServiceNow are checking credentials against the same LDAP server(s), if appropriate. Check the LDAP server in the Remote Support interface under **/login > Users & Security > Security Providers**. To check the LDAP server for ServiceNow, see the LDAP Integration Setup article at [wiki.servicenow.com/index.php?title=LDAP_Integration_Setup](https://wiki.servicenow.com/index.php?title=LDAP_Integration_Setup).
- If LDAP authentication is not being used, log into ServiceNow, browse to **User Administration > Users**, select the user to be used for testing, and focus the **Remote Support Username** field.
If this field does not exist while viewing a user, hover over the icon next to **User** on the title bar, select **Configure > Form Layout**, and move the **Remote Support Username** field from the **Available** list to the **Selected** list. Once done, enter the name of a known-working Remote Support user account in this field and save.

**Configure Email Notifications**

1. Browse to **System Notification > Email > Notification**.
2. Filter by **Name=Bomgar** and then click on **Bomgar Notification**.
3. Verify that:
   a. **When to send > Send When equals Event is fired**.
   b. **When to send > Event Name equals x_bmgr_support_ent.link.notification**.
   c. **Who will receive > Users/groups in fields equals Caller**.
   d. **Table equals Incident [incident]**.
4. Customize the **Message** text under the section **What it will contain**. This defaults to the **event.parm2** variable. By default, **event.parm2** contains only the BeyondTrust session key URL, though this can be changed in the BeyondTrust Integration's Appliance settings.
5. Browse to **System Properties > Email Properties**. Verify that the settings are correct for your network.

**Assign Users Appropriate Roles**

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

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

1. Browse to **User Administration > Users**.
2. Select a user.
3. Find the **Roles** tab and click the **Edit** button.
4. Add the **x_bmgr_support_ent.itil** role from the **Collection** list to the **Roles** list
5. Click **Save**.
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 http://wiki.servicenow.com/index.php?title=MID_Server_Configuration#gsc.tab=0.

Rep Survey Task Association Option

It is possible to associate Remote Support sessions with ServiceNow incidents by means of a field in the Rep Exit Survey. Several things need to be configured to make this functionality work.

Configure Rep Exit Survey in Remote Support

1. In Remote Support /login, browse to Public Portals> Exit Surveys.
2. Under Representative Survey, click the Add button and select Text Box.
3. For Question Text, type Enter the task number. Make sure Question Name has the value of task_number and the Answer Required checkbox is checked.

Configure Rep Exit Survey Business Rule in ServiceNow

1. In ServiceNow, browse to System Definition > Business Rules and search by Name for Associate Session via Rep Survey and click the business rule with the same name.
2. In the Business Rule record, the Active checkbox is unchecked by default. Check this box and click Update to save the record.

Once these changes have been made, sessions started outside of ServiceNow will now be associated with a Task record within ServiceNow. The representative will simply paste the number or sys_id of a Task in ServiceNow to which they would like to associate the Remote Support session, at the end of the session.
Test the Setup of the Remote Support and ServiceNow Integration

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

Test Connectivity from ServiceNow and Remote Support

The **Load Issues** button is an effective and quick way to test connectivity from ServiceNow to Remote Support.

1. Log into ServiceNow as an administrator.
2. Browse to BeyondTrust Remote Support and click Appliances.
3. Select the **Default** appliance.
4. Ensure the **Hostname**, **OAuth Client ID** and **OAuth Client Secret** fields are properly configured and the **Integration Enabled** checkbox is checked.
5. Click the **Load Issues** button at the top of the form.

If connectivity is successful, a browser alert box will show the number of issues that were retrieved, and you've successfully tested connectivity from ServiceNow to Remote Support.

If connectivity is unsuccessful, a browser alert box will show a message stating "Something went wrong while attempting to load issues", or "Unknown host". If you get one of these messages, check the following:

- Ensure the **Hostname** field is correct.
- Ensure the **OAuth Client ID** field is correct.
- Ensure the **OAuth Client Secret** field is correct. You will need to generate and copy a new client secret in Remote Support, save the API configuration, then paste the new value in the **OAuth Client Secret** field in ServiceNow.
- Ensure the **Integration Enabled** checkbox is checked.

If configuration appears to be correct, check the **Application Logs** under **System Logs > System Log > Application Logs** to see if there are any errors of note.

Ultimately, there may be something blocking somewhere between ServiceNow and Remote Support, like a firewall or network rule. It this is the case, we recommend you ask your network team to help identify the problem.

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 18.
2. Open a closed incident in ServiceNow, open a resolved incident, and make sure the **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 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. Go to BeyondTrust Remote Support > Appliances > Default and check if Use Rep Console for Session Keys field is checked.
   
   - If Use Rep Console for Session Keys is checked, click the Session Key button. This launches the Remote Support representative console, subsequently opening the Session Key dialog box. 
   - If Use Rep Console for Session Keys is not checked, click the Session Key button. It should return a window with a seven-digit session key, along with a session key URL and a button to email the key. In case of failure, make sure the following are true:
     - The ServiceNow user account is mapped to a Remote Support user account as described in this guide. 
     - The ServiceNow API User Connection test completes successfully. 
     - The Remote Support Hostname and OAuth Client fields are set correctly in ServiceNow under BeyondTrust Remote Support > Appliances > Default.

Test Remote Support Session Import

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

2. Use the 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. 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.
   c. The IP address is set up correctly, following the steps below:
      - Log into ServiceNow as an admin.
      - Browse to System Logs > Transactions, remove all existing filters, and add a URL filter of /api/x_bmgr_support_ent/outbound_event/session_end.
      - Click one of the results and make sure the originating IP address of the transaction is included in the Secure Remote Access Appliance IP Address field of the integration appliance settings under BeyondTrust Remote Support > Appliances > Default.
Test Remote Support Get Support Now (ESS)

1. Log into ServiceNow as a non-admin (non-ITIL) user, or use the key icon in the upper left of the screen to switch to such a user if an admin is already logged in.
2. Locate or create an incident which has an assigned non-ITIL caller and an assigned ITIL technician.
3. Use the Impersonation key icon in the upper left corner of the screen to impersonate the non-ITIL user for the above incident.
4. Open the incident and click Get Support Now.
5. If you do not see a Get Support Now button, make sure that Self Service Enabled is checked under BeyondTrust Remote Support > Appliances > Default > Employee Self Service.
6. The customer should be presented with the list of the issues configured as Active under BeyondTrust Remote Support > Appliances > Default > Employee Self Service.
7. If the session does not start, then in the Remote Support interface, go to /login > Public Portals > Public Sites and edit the public site for the configured Secure Remote Access Appliance under BeyondTrust Remote Support > Appliances > Default, and make sure Use Issue Submission Survey is enabled.

Test Remote Support Jump Technology

1. Log into the Remote Support representative console and search for a Jump Client which is currently running on a machine included in the ServiceNow CMDB. This ensures the Jump Client in question can be accessed using the Configuration Item in ServiceNow incidents.
2. In ServiceNow, create or open an incident, assign the above host as the Configuration Item (CI) of the incident, and click the orange Jump to CI with BeyondTrust Remote Support button.
3. Run the resulting .BRCS file and make sure the representative console launches a session with the remote host in question.
Transfer the BeyondTrust-ServiceNow 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://wiki.servicenow.com/index.php?title=Transferring_Update_Sets.

2. Follow the same steps to transfer the Remote Support - ServiceNow Integration Configuration update set.

Configure Production Outbound Event

1. In the BeyondTrust interface, go to /login > Management > Outbound Events.
2. Copy the URL of the event for the original ServiceNow instance.
3. Click Add to create a new HTTP recipient.
4. In the URL field, paste and replace the name of the original ServiceNow instance with that of the new one such that /api/x_bmgr_support_ent/outbound_event/session_end is preserved at the end. The result should be similar to https://prod.example.com/api/x_bmgr_support_ent/outbound_event/session_end as opposed to https://dev.example.com/api/x_bmgr_support_ent/outbound_event/session_end.
5. Scroll to Events to Send and check the following events:
   - Support Session End
   - Customer Exit Survey is Completed
   - Representative Survey is Completed
6. Scroll to the bottom and click Add Recipient.
7. Locate the outbound event created during testing and click Edit.
8. Check the Disabled checkbox and save.

Configure Custom Link
2. Edit or add a link and update the ServiceNow URL to direct to the destination instance of ServiceNow. Be careful to preserve `/nav_to.do?uri=task.do?sys_id=%EXTERNAL_KEY%` at the end.
3. Click Save.
4. Test the integration setup in its new location following the same steps used to test the original instance. See "Test the Setup of the Remote Support and ServiceNow Integration" on page 21.
Use Cases for the ServiceNow Enterprise Integration with BeyondTrust Remote Support

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

Generate Session Key

Technicians can generate a session key from within an incident and give the customer the key to initiate a support session.

The integration provides support for Incidents, Change Requests, New Call Records, and Catalog Requests.

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

Import Remote Support Session Data into a ServiceNow Record

Once the Remote Support session ends, ServiceNow is automatically updated with information gathered during the session, including:

- Chat Transcript
- File Transfer Information
- Session Notes
- Customer System Information
- Representative Involved
- Customers Involved
- Teams Involved
- Session Recordings
- Customer and Representative Survey Results

Jump to Configuration Item

Technicians can leverage Remote Support Jump Technology to access a configuration item associated with an incident directly from the incident. Additionally, this same technology can be leveraged directly from within a configuration item as well, even if it is not associated with an incident.

Once the session ends, a detailed report of the session is imported into ServiceNow and associated with the incident and/or configuration item record from which the session key was generated.
Customer-Initiated Chat from ESS

Customers can open incidents for which they are assigned as the caller and request a support session with a technician by clicking Get Support Now.

This functionality provides customers with an expedient path to resolution while also giving the technician the necessary context to effectively assist the customer.

Sessions initiated using Remote Support's click-to-chat functionality, can be elevated to full support sessions if the technician deems it necessary.

Customer Initiated Chat from Service Portal

Customers can request a support session with a representative from a ServiceNow Service Portal where the Remote Support Get Support Now widget has been added. This includes any context within an Incident, like the Incident or Ticket form, or any context outside the scope of an Incident, like the SP homepage.

This functionality allows customers an expedient path to resolution, while also providing the technician with the necessary context to effectively assist the customer.

Sessions initiated using Remote Support's click-to-chat functionality, can be elevated to full support sessions if the technician deems it necessary.

Access ServiceNow Records from the Representative Console

Using Remote Support custom links ability, a representative can access the associated ServiceNow record directly from within the representative console. This saves time searching for the record in ServiceNow and provides the representative with any available issue details, history, or other context to help quickly resolve the issue.

Associate Sessions with ServiceNow Records Manually

Whether a representative has created an incident for the current session or has found an existing session, sessions originating outside the scope of a ServiceNow record can be manually associated with the appropriate item. This allows session details to be added automatically to the incident when the session ends.

To make this association, the representative enters the numeric ID of the Incident, Change Request, New Call Record, or Catalog Request into the External Key field while in session.

Technicians can use the human-readable record number from ServiceNow to easily make this association.
Create Incidents Automatically

For customers who have applicable processes, the integration can be configured to automatically create a ServiceNow incident based on Remote Support sessions, either when the representative joins the session, or manually via a Remote Support rep console's custom link.

This process can simplify workflows and reduce the number of clicks needed for support representatives.
Troubleshooting

This section is designed to assist members of implementation and support teams who are either installing or supporting the ServiceNow Remote Support Integration. The items listed here cover potential issues one may encounter when working with the integration, along with steps to take to investigate and alleviate those issues.

Throughout this section you'll see a reference to "ServiceNow application logs". This is referring to the Application Logs in ServiceNow, which can be found in System Logs > System Log > Application Logs.

ServiceNow has other logs which are also helpful. Those include:

1. Transaction Logs, found at System Logs > Transactions
2. All Logs, found at System Logs > System Log > All
3. Warning Logs, found at System Logs > System Log > Warnings
4. Error Logs, found at System Logs > System Log > Errors

Note: This troubleshooting guide assumes the audience has a basic knowledge of both ServiceNow and Remote Support.

The Load Issues Button is not Working

If you get an error stating, "Something went wrong while attempting to load issues", most likely something on the Secure Remote Access Appliance record in ServiceNow is not configured properly. Check the following:

- Ensure the Hostname field is correct.
- Ensure the OAuth Client ID field is correct.
- Ensure the OAuth Client Secret field is correct. You will have to generate and copy a new client secret in Remote Support /login, save the API configuration, then paste the new value in the OAuth Client Secret field in ServiceNow. It's very common that this OAuth Client Secret value is copied to the clipboard, but the API Account record is never saved in Remote Support /login. It's recommended that you copy the value and immediately save the API Account, then paste the value in the Secure Remote Access Appliance record in ServiceNow.
- Ensure the Integration Enabled checkbox is checked.

If you get an error stating, "Unknown host", this is essentially a communication issue from ServiceNow to the Secure Remote Access Appliance, unless the hostname is set incorrectly on the Secure Remote Access Appliance configuration.

Tip: Double-check the hostname on the Secure Remote Access Appliance configuration in ServiceNow. If that looks good, then recommend the customer involve their network team to determine if there is a network block in place, such as a firewall or network rule.

Support Sessions Are Not Being Written to ServiceNow

If support sessions aren't being written in ServiceNow, there could be a communication issue. First check to ensure communication is open from Remote Support to ServiceNow.
**Tip:** Log into the Remote Support /login interface and ensure Support Session End is checked on the HTTP Recipient for the Outbound Event. If Support Session End is not checked, check the box, save the HTTP Recipient, then run another support session and see if the record is written to ServiceNow.

**Tip:** If the Outbound Event looks good, log into the Secure Remote Access Appliance /appliance interface and run a TCP test to the hostname of the customer's ServiceNow instance on port 443. If the TCP test yields a non-200 response, it is advisable to involve your network team to determine if there is a network block in place such as a firewall or network rule.

**Tip:** If the TCP test yields a 200 response, then start another session from ServiceNow, end the session, then open the ServiceNow transaction logs and filter by records that are Created on Today (or Last 15 minutes for fewer results) AND URL starts with /api/x_bmgr_support_ent/outbound_event/session_end. If you don't see a record for the session you just ran, then there is a communication issue from Remote Support to ServiceNow and you should recommend the customer involve their network team to determine if there is a network block in place such as a firewall or network rule.

**Tip:** If you see the transaction record in the Transaction Logs, then double-check and reset the OAuth Client ID and OAuth Client Secret fields on the Secure Remote Access Appliance record in ServiceNow. It's very common that this OAuth Client Secret value is copied to the clipboard, but the API Account record is never saved in Remote Support /login. It's recommended that you copy the value and immediately save the API Account, then paste the value in the Secure Remote Access Appliance record in ServiceNow. Run another support session. If the Support Session record still does not show up in ServiceNow, check the ServiceNow application log to see if there are any errors that may explain why the record isn't being written.

### Data is Missing from the Support Session in ServiceNow

If data is missing from the Support Session record, it's possible the Remote Support event types have not been updated or only a subset of the event types have been set to be imported for each support session record that is written to ServiceNow.

**Tip:** Identify which pieces of data are missing, then check the Events To Import field under the Miscellaneous tab under the Secure Remote Access Appliance configuration in ServiceNow to see if a subset of the events are set to be imported. If you don't see any events, it's possible the Update Event Types menu item under the BeyondTrust Remote Support menu was never clicked, as outlined in the "Update BeyondTrust Session Event Types" on page 12 section of this guide.

### Session Key Button is not Showing on the Incident Form

If the Session Key button is not showing on the Incident form, there are a few things that can be checked.

**Tip:** Check to see if there were any adjustments or customizations made to any of the integration's UI Actions. Because these UI Actions render the buttons, it is not recommended that these be edited.

**Tip:** If no customizations to the UI Actions were done, ensure the Secure Remote Access Appliance configuration is named "Default", with matching case and no whitespace. Any name other than Default will cause the Session Key button to be hidden.
Tip:
If the name of the appliance is Default, take a look at the customer's Incident States (see "Configure Incident States" on page 18) and ensure that the Condition field in the UI Action is showing the button for the proper incident states. Note that there are four Session Key UI Actions, two for Task records and two for New Call records, described below. Only one button will show per record type.

- Session Key for Task Record and Remote Support Command API
- Session Key for Task Record and Remote Support Scripting API
- Session Key for New Call Record and Remote Support Command API
- Session Key for New Call Record and Remote Support Scripting API

Session Key Button Gives an Unknown Host Error

If you get an error stating, "Unknown host", this is essentially a communication issue from ServiceNow to the Secure Remote Access Appliance, unless the hostname is set incorrectly on the Secure Remote Access Appliance configuration.

Tip: Double-check the hostname on the Secure Remote Access Appliance configuration in ServiceNow. If that looks good, contact your network team to determine if there is a network block in place, such as a Firewall or network rule.

Requested Support Representative is not Available at This Time

If you get an error stating, "Requested support representative is not available at this time", this means the Use Rep Console for Session Keys is unchecked in the Secure Remote Access Appliance configuration AND the representative that is mapped to the ServiceNow user who generated the session key is not logged into the representative console.

Tip: Have the representative log into the representative console OR check the Use Rep Console for Sessions Keys checkbox. This will launch the Representative Console, if it is installed on the representative's workstation.

Error Validating Parameter 'queue_id': The Representative Could Not Be Found

If you get an error stating, "Error validating parameter 'queue_id': The representative could not be found", this means the ServiceNow user trying to generate a session key is not mapped to a Remote Support user. Typically, customers will use an LDAP store for both ServiceNow and Remote Support, which means the usernames in each system will match exactly.

Tip: If an LDAP store is not used and the usernames between ServiceNow and Remote Support do not match exactly, you'll have to manually map the usernames so that when a session key is generated, a Remote Support user can be found.

For more information on this issue, please see the section titled "Configure Remote Support Username and Authentication" on page 18 in this guide.
Sessions are not Associated with Records in ServiceNow

If a customer is using the feature where a record number is being manually entered into the External Key field during a session, but the session isn't getting associated with that record when the support session is written to ServiceNow, they may be using a record that is unsupported or they have customized the number prefix for the record type they are using. The supported types include Incident, Change Request, Service Catalog Request, and Problem. The corresponding record number prefixes include: INC, CHG, REQ, and PRB.

Tip: Ensure the customer is entering a record number format which is supported. Examples include INC0010074, CHG00000036, REQ0010001, or PRB0000101.

Another reason a support session may not be getting associated with a record in ServiceNow is that the custom field which links the support session to the ServiceNow record is never getting set on the support session. This can happen when a session starts outside of ServiceNow or with a custom component within ServiceNow.

Tip: Ensure the support session is starting from within ServiceNow and the customer is using out of the box components.

Invalid Custom Field Code Name

An "invalid custom field code name" error can occur when there is an attempt to generate a session key, but a custom attribute with that code name doesn't exist in the system. This can happen if a step is missed in the initial integration configuration.

Tip: Create the missing custom field and try to start another support session from ServiceNow.

Error Validating Parameter 'snow_task_id': The Session Attribute is Invalid

An "error validating parameter 'snow_task_id': The session attribute is invalid" error can occur when there is an attempt to generate a session key, but a custom attribute with that code name doesn't exist in the system. This can happen if a step is missed in the initial integration configuration.

Tip: Create the missing custom field and try to start another support session from ServiceNow.

Chat Dialogue or System Information not Showing in Session Record in ServiceNow

The chat dialogue or system information for a support session can be missing if ServiceNow hasn't been configured to allow the integration to write to the Journal Entry (named sys_journal_field) table.

Tip: Ensure the Journal Entry table Application Access is configured for Can create and Can update and accessible from All Application Scopes.
ServiceNow and BeyondTrust Integration Network Diagrams

ServiceNow-Remote Support Integration Network Diagram
ServiceNow-Remote Support Integration Mid Server Network Diagram