Remote Support

ServiceNow ITSM  Auto-Create Feature
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ServiceNow Remote Support ITSM Auto-Create Feature

The ServiceNow Remote Support Auto-Create Feature allows customers to provide automatic creation of records in ServiceNow as an optional feature of our ServiceNow Enterprise Integration.

This feature is part of the ServiceNow Remote Support ITSM application. By default, the auto-create functionality is turned off and not available to the integration users. There is no additional cost to customers who wish to use the feature. Directions to enable the feature are listed in this guide.

Integration Requirements

- All the requirements of the ServiceNow Enterprise Integration are satisfied and the base integration is working.
- A working version of the ServiceNow Enterprise Integration version 7.7.0 or later.
Configure BeyondTrust Remote Support

All of the steps in this section take place in the BeyondTrust Remote Support /login administrative interface. To access your Remote Support interface go to the hostname of your Remote Support instance, and type /login (e.g., https://support.example.com/login).

**IMPORTANT!**

*Customers can’t use Option 1 and Option 2 simultaneously. Customers must choose one or the other, based on their use cases and process.*

Option 1: Add Outbound Events

Outbound events are used to notify ServiceNow that a representative has joined a Remote Support Session and a "create record" request can then be sent to ServiceNow.

1. Go to /login > Management > Outbound Events.
2. Click HTTP Recipient Add and name it ServiceNow Integration or something similar, depending on your ServiceNow instance.
3. Set the URL to https://support.example.com/api/x_bmgr_support_ent/outbound_event/case?auto_create=true, where support.example.com is the ServiceNow instance name.
4. Scroll to Events to Send and check the following event: **Someone Joins a Support Session**.
5. At the top of the page click Save.

Option 2: Setup Custom Link

Remote Support Custom Links can be configured to allow representatives to auto-create ServiceNow records from within the Remote Support representative console.

2. Click Add to create a new custom link.
3. Enter a name for the link, then set the URL to https://support.example.com/nav_to.do?url=x_bmgr_support_ent_auto_create_link.do?lsid=%SESSION.LSID%26username=%REP.USERNAME%26auto_create=true, 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.
4. Click Save to save the new link.
Configure Custom Fields

There are a number of custom fields that are available to use in an auto-create scenario. These fields can be used to populate values when the session starts, then configured in ServiceNow to be mapped to record fields.

1. Browse to Configuration > Custom Fields.
2. Click Add to create a new Custom Field for each of the following custom field code names:
   - customer_email
   - customer_username
   - snow_task_id (this field may have already been created with the base ServiceNow Enterprise Integration configuration).
   - snow_case_id (this field may have already been created with the base ServiceNow Enterprise Integration configuration).
   - custom_field_1
   - custom_field_2
   - custom_field_3

Note: The Code Names must match, but the Display Name is arbitrary.
Configure ServiceNow

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.

Enable Auto-Create Functionality

1. Browse to BeyondTrust Remote Support and click Appliances. Select the appliance you are configuring.
2. Right-click on the title bar, then select Configure > Form Layout.
3. Drag the field labeled Auto Create Enabled from the Available list to the Selected list.
4. Click the Save button.
5. You should now see the Auto Create Enabled checkbox on the form. Click this checkbox, then click the Update button on the title bar. The form will reload.

Auto-Record Creation Fields

You should now see a section just below the main (top) section of the form labeled Auto-Record Creation. This section contains the following fields:

- **Auto-Create For These Portals** (comma separated list): Records will be auto-created for sessions whose public portal is listed in this field.
- **Required Auto-Create Custom Fields** (comma separated list): Records will be auto-created for sessions only if all the custom fields listed are populated with a value.
- **Auto-Create for Attended Sessions** (checkbox): Records will be auto-created for sessions that are attended by a customer when this box is checked.
- **Auto-Create for Unattended Sessions** (checkbox): Records will be auto-created for sessions that are unattended when this box is checked.
- **Auto Create Record Type**: This is the type of record which will be auto-created. Options include:
  - Call: new_call
  - Incident: incident
  - Change Request: change_request
  - Service Catalog Request: sc_request
  - Problem: problem

Auto-Record Creation Related Lists

You should now see the following Related Lists at the bottom of the form that can be used to configure additional auto-create functionality:

- **Static Record Fields**
- **Dynamic Record Fields**
- Record Lookup Fields
- Dynamic Record Lookup Fields

**Update Remote Support Record Fields**

Record fields are used when mapping static data or Remote Support data to ServiceNow record fields during auto-creation of records. This step updates the database with all the available event types.

Browse to BeyondTrust Remote Support and click Update BeyondTrust Record Fields. This loads all the available Remote Support Record Fields into the database, so that field mappings can be achieved.

**Setup Auto-Create Field Mappings**

Browse to BeyondTrust Remote Support and click Appliances. Click the appliance you are configuring. Scroll down to the related list section. You will see four related lists, each representing a type of field mapping, listed below followed by details:

- **Static Record Fields**: Maps a static, default value to a ServiceNow Record field.
- **Dynamic Record Fields**: Maps a Remote Support Session value to a ServiceNow Record field.
- **Record Lookup Fields**: Maps a static, default value to a ServiceNow Record lookup field.
- **Dynamic Record Lookup Fields**: Maps a Remote Support Session value to a ServiceNow Record lookup field.

**Static Record Fields**

Use this type of mapping when you want to assign the same static value to the same ServiceNow text field or option list for every record created.

**Example:**

For every record that is auto-created, the customer wants the State field to set to Resolved. The record field for State is selected from the menu and the value for Resolved is 6, so the following values would be set:

- Record Field=State (selected from the menu)
- Default Value=6

Record Field Label is arbitrary.

- **Record Field Label**: an arbitrary value used to identify the mapping.
- **Record Field**: The record field that should be populated upon auto-creation.
- **Default Value**: The static value that should be populated in the selected record field.
Dynamic Record Fields

Use this type of mapping when you want to assign a field from the Remote Support session to the same ServiceNow text field or option list for every record created.

Example

For every record that is auto-created, the customer wants the Short Description field to be set to the value contained in the Remote Support Session’s External Key field. The record field for Short Description is selected from the Record Field menu and the Remote Support External Key field is selected from the Remote Support Field menu, so the following values would be set:

- **Record Field**=Short Description (selected from the menu)
- **BeyondTrust Field**=External Key (selected from the menu)

Field Label is arbitrary.

- **Record Field Label**: An arbitrary value used to identify the mapping.
- **Record Field**: The record field that should be populated upon auto-creation.
- **BeyondTrust Field**: The Remote Support session value that should be populated in the selected record field.

Record Lookup Fields

Use this type of mapping when you want to assign the same static value to the same ServiceNow field, which requires a lookup, for every record created.

Example

For every record that is auto-created, the customer wants the **Assigned To** field to be set to a specific user, whose username is bob.ross. The record field for **Assigned To** is selected from the **Record Field** menu. The **Lookup Table Id** is set to the table to search and the **Lookup Field Id** is set to the field in the lookup table to compare the static value with. **Default Value** is the static value with which to lookup the user, so the following values would be set:

- **Record Field**=Assigned To (picked from the chooser)
- **Lookup Table Id**=sys_user
- **Lookup Field Id**=user_name
- **Default Value**=bob.ross

Field Label is arbitrary

- **Field Label**: A value used to identify the mapping.
- **Record Field**: The record field that should be populated upon auto-creation.
- **Lookup Table Id**: The ServiceNow table where we should lookup the value for this record field.
- **Lookup Field Id**: The field in the lookup table that we should search on when looking up the value for this record field.
- **Default Value**: The static value that should be used when looking up the value for this record field.

Dynamic Record Lookup Fields

Use this type of mapping when you want to assign a field from the Remote Support session to the same ServiceNow field, which requires a lookup, for every record created.
Example

For every record that is auto-created, the customer wants the **Caller** field to be set to a specific user, whose username we will get from the Remote Support session. The record field for **Caller** is picked from the **Record Field** chooser. The **Lookup Table Id** is set to the table to search and the **Lookup Field Id** is set to the field in the lookup table to compare the Remote Support value with. **BeyondTrust Customer Username** field is picked from the **BeyondTrust Field** chooser, so the following values would be set:

- **Record Field**=Caller (selected from the menu)
- **BeyondTrust Field**=Customer Username (selected from the menu)
- **Lookup Table Id**=sys_user
- **Lookup Field Id**=user_name

Field Label is arbitrary

- **Field Label**: A value used to identify the mapping.
- **Record Field**: The record field that should be populated upon auto-creation.
- **Lookup Table Id**: The ServiceNow table where we should lookup the value for this record field.
- **Lookup Field Id**: The field in the lookup table that we should search on when looking up the value for this record field.
- **BeyondTrust Field**: The Remote Support session value that should be used when looking up the value for this record field.

Common Lookup Fields

The following information is provided to help you when creating lookup field mappings. A **Lookup Field** is populated by looking in another ServiceNow table to retrieve a value.

For example, the **Caller** field on an **Record** is a lookup field. The ServiceNow table that is used is named sys_user. We could lookup a user by querying on the user_name field with a value of john.doe. This would populate the **Caller** field with the sys_user record for John Doe.

Below are some common ServiceNow record lookup fields that you may encounter in an auto-create scenario.

<table>
<thead>
<tr>
<th>Record Field</th>
<th>Record Field Name</th>
<th>Table</th>
<th>Common Query Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caller</td>
<td>caller_id</td>
<td>sys_user</td>
<td>name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>user_name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>email</td>
</tr>
<tr>
<td>Opened By</td>
<td>opened_by</td>
<td>sys_user</td>
<td>x_bmgr_support_ent_bomgar_username</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>user_name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>email</td>
</tr>
<tr>
<td>Assigned To</td>
<td>assigned_to</td>
<td>sys_user</td>
<td>x_bmgr_support_ent_bomgar_username</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>user_name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>email</td>
</tr>
<tr>
<td>Assignment Group</td>
<td>assignment_group</td>
<td>sys_user_group</td>
<td>name</td>
</tr>
<tr>
<td>Configuration Item</td>
<td>cmdb_ci</td>
<td>cmdb_ci</td>
<td>name</td>
</tr>
<tr>
<td>--------------------</td>
<td>--------</td>
<td>--------</td>
<td>------</td>
</tr>
<tr>
<td>Location</td>
<td>location</td>
<td>cmn_location</td>
<td>name</td>
</tr>
</tbody>
</table>
Test the BeyondTrust 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.

You can quickly test the record creation with a URL similar to https://support.example.com/api/start_session?issue_menu=1&customer.name=Bobbeeee&customer.company=BobCoInc&customer.details=HelpPlease&codeName=issue_4&session.custom.customer_username=corinne.cowan&c2cjs=1

If using the Outbound Event approach, after the representative joins the session a new record should appear when you refresh the record list in ServiceNow. Additionally, the ServiceNow Task Id should be populated in the representative console after a few seconds with the sys_id of the newly created record.

If using the Custom Link approach, after the representative clicks the Create Record custom link a new record should appear when you refresh the record list in ServiceNow. Additionally, the ServiceNow Task Id should be populated in the representative console after a few seconds with the sys_id of the newly created record.