



# BeyondTrust

## **Remote Support Zendesk Integration**

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## BeyondTrust Remote Support Integration with Zendesk

### IMPORTANT!

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

Service desks and customer support organizations using Zendesk can integrate with BeyondTrust to improve service levels, central support processes, and strengthen compliance. This document describes the installation and configuration of the BeyondTrust Remote Support integration with Zendesk.

This document describes the installation and configuration of the BeyondTrust Remote Support integration with Zendesk. The integration consists of two main parts:

- Middleware which receives event notifications from the Secure Remote Access Appliance and pushes data into Zendesk.
- An app that can be installed within Zendesk to provide UI elements allowing the user to do things such as generate a session key or Jump to a remote system.

The Zendesk integration with BeyondTrust Remote Support provides the following functionality:

- A BeyondTrust session key can be initiated from within a Zendesk ticket.
- An agent can type a machine name into a field on the screen and Jump to the device using BeyondTrust Jump Technology.
- A customer can request help on an existing issue via the Zendesk Customer Portal.
- The representative can manually associate a session with a particular Zendesk ticket by editing the external key while in a BeyondTrust session.
- A custom link in the BeyondTrust representative console can automatically open the ticket in Zendesk.
- When the BeyondTrust session ends, session data is pushed into Zendesk and can be viewed from within the ticket.

# Prerequisites for the BeyondTrust Remote Support Integration with Zendesk

To complete this integration, please ensure that you have the necessary software installed and configured as indicated in this guide, accounting for any network considerations.

## Applicable Versions

- BeyondTrust Remote Support: 14.x and newer
- Zendesk: "New" Zendesk (current platform since 9/12/2012)

## Network Considerations

The following network communication channels must be open for the integration to work properly:

| Outbound From                        | Inbound To                           | TCP Port #                       | Purpose   |
|--------------------------------------|--------------------------------------|----------------------------------|---|
| BeyondTrust Middleware Engine Server | Zendesk Server                       | 443                              | Zendesk API calls.  |
| BeyondTrust Middleware Engine Server | Secure Remote Access Appliance       | 443                              | BeyondTrust API calls.  |
| Secure Remote Access Appliance       | BeyondTrust Middleware Engine Server | 8180 (default)<br>443 (optional) | The BeyondTrust Middleware Engine server receives outbound events from the appliance. |

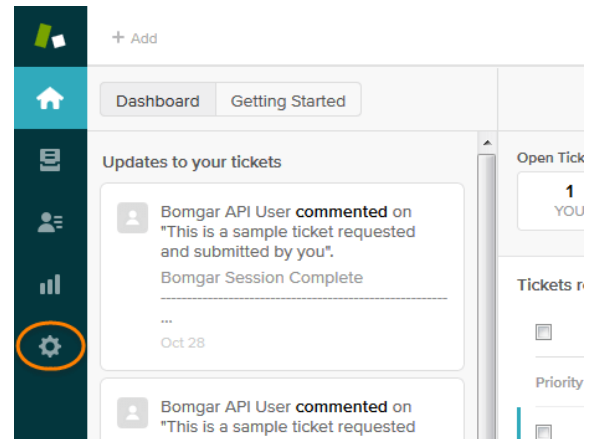
## Prerequisite Installation and Configuration

The Zendesk integration is a BeyondTrust Middleware Engine plugin. To install the BeyondTrust Middleware Engine, follow the instructions in the [BeyondTrust Middleware Engine Configuration](#) document at [www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine](http://www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine).

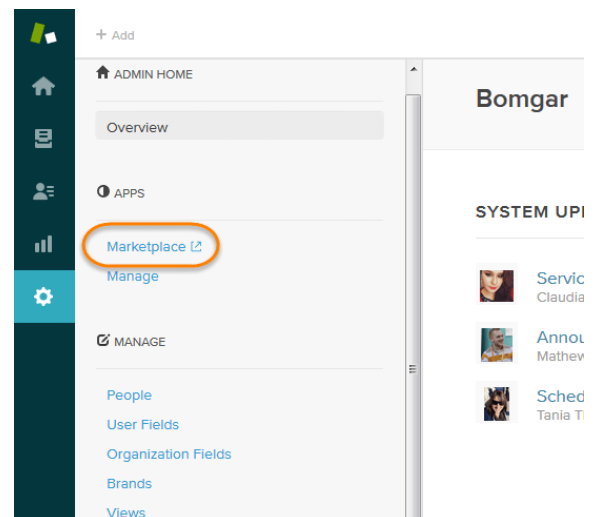
# Configure Zendesk for Integration with BeyondTrust Remote Support

## Download and Install the BeyondTrust Remote Support App for Zendesk

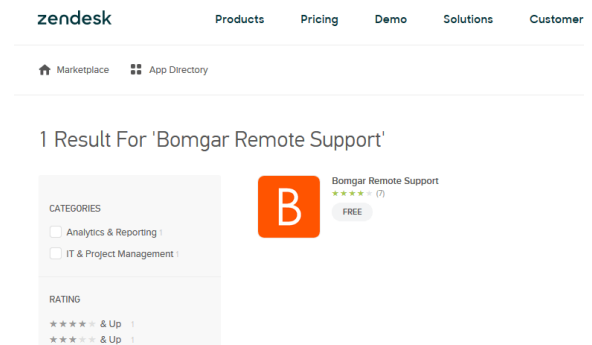
1. Log into the Zendesk Agent Interface as a user with Administrator access.
2. Click the **Admin** (gear) icon in the left navigation area to open the **Admin Home** menu.



3. Select **Apps > Marketplace**.



4. Search the Marketplace for **BeyondTrust Remote Support**.
5. Select and install the app.

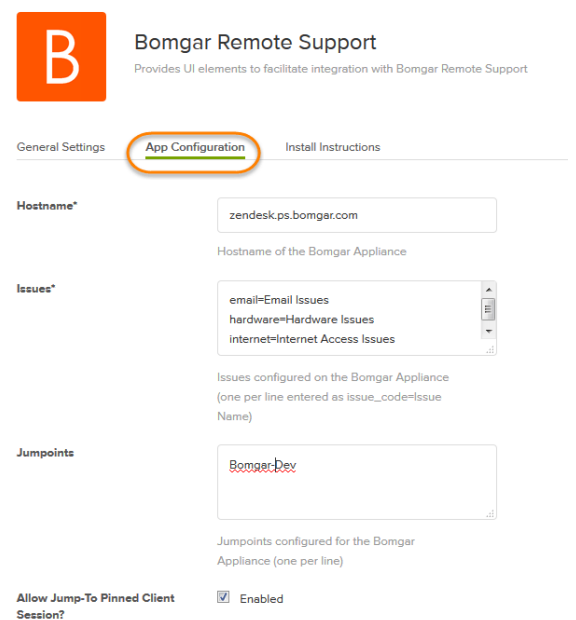


## Configure the App


1. **Hostname** (required) - The hostname of the Secure Remote Access Appliance.
2. **Issues** (required) - A list of issues from which an end-user can choose when using the **Get Support Now** button to start a chat session. These should be entered one per line with the format **issue\_code=IssueName**, where **issue\_code** is the code name configured for the issue in the BeyondTrust /login interface and **IssueName** is the user-friendly name displayed to the end-user in the dropdown.

For example, if there is an issue in BeyondTrust named **General Technical Issues** with a code name of **general\_tech**, the corresponding entry in the issues list in Zendesk should be **general\_tech=General Technical Issues**.

3. **Jumpoints** - A list of Jumpoints configured for the Secure Remote Access Appliance from which an agent can choose. These should be entered one per line.
4. **Allow Jump-To Pinned Client Session** - Determines if agents can Jump to Jump Clients.
5. **Allow Push and Start Local Jump Session** - Determines if agents can Jump to systems on their local network.
6. **Allow Push and Start Remote Jump Session** - Determines if agents can Jump to systems through a Jumptoint. If enabled, requires at least one Jumptoint to be entered.
7. **Allow Remote Desktop (RDP) Session** - Determines if agents can start Remote Desktop Protocol sessions through BeyondTrust. If enabled, requires at least one Jumptoint to be entered.
8. **Allow Remote Console Session** - Determines if agents can start Shell Jump sessions through BeyondTrust. If enabled, requires at least one Jumptoint to be entered.

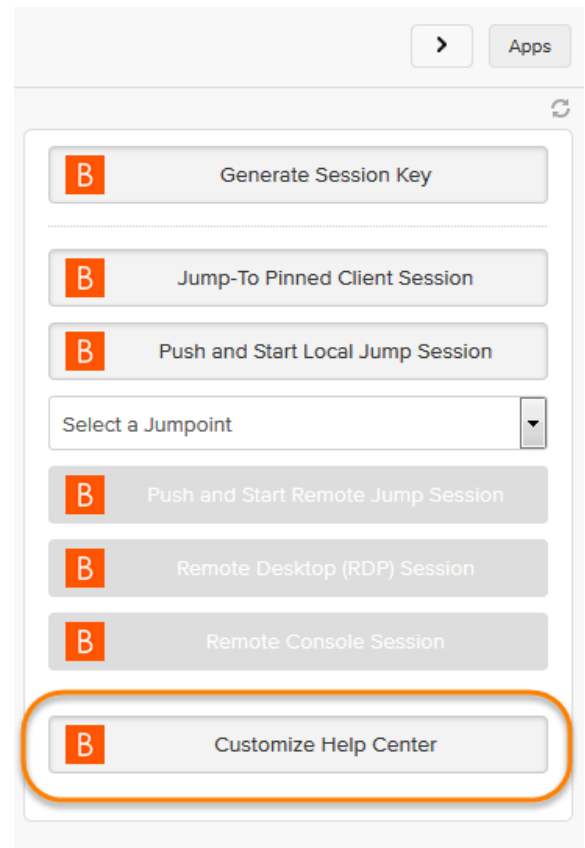


Once the app is installed and configured, you can see the UI elements in the appropriate section when viewing an existing ticket.

 **Note:** The integration functionality is not available until the ticket has been saved. Therefore, buttons are not present on a new, unsaved ticket, though the app does render a brief message to that effect.

## Create a Method for End-Users to Request Support

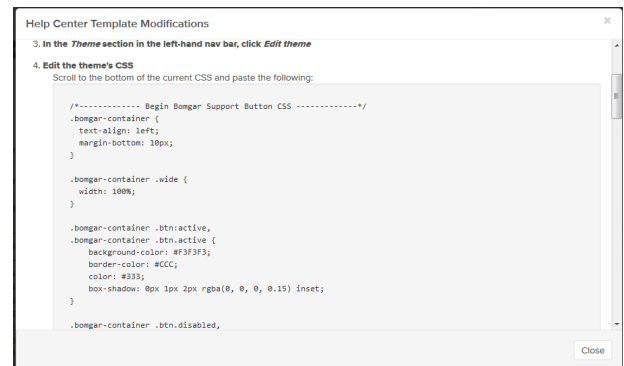
1. When viewing a ticket as an administrator, click the **Customize Help Center** button.



2. This opens a modal with instructions for editing the current theme to add the **Support** button to ticket views for end-users. When clicked, a chat session starts and is automatically tied back to the ticket. The session is routed to the appropriate team based on the issue selected by the user prior to clicking the button.

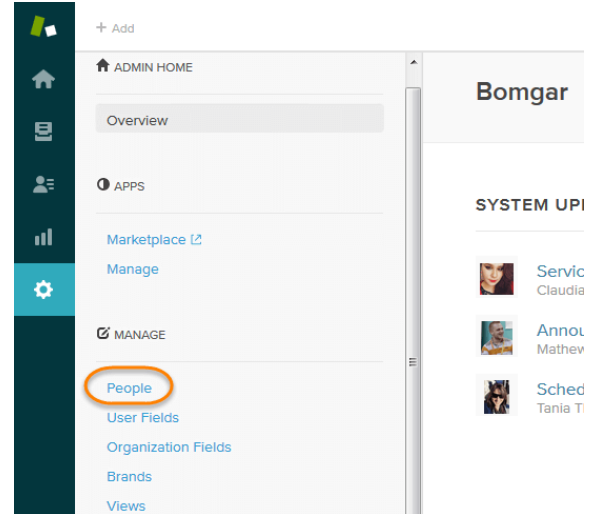


**Note:** For information on configuring teams, issues, and session routing with BeyondTrust, please see [Support Teams](https://www.beyondtrust.com/docs/remote-support/getting-started/admin), [Issues](https://www.beyondtrust.com/docs/remote-support/getting-started/admin), and [Equilibrium for Automatic Session Routing at www.beyondtrust.com/docs/remote-support/getting-started/admin](https://www.beyondtrust.com/docs/remote-support/how-to/equilibrium) and [www.beyondtrust.com/docs/remote-support/how-to/equilibrium](https://www.beyondtrust.com/docs/remote-support/how-to/equilibrium).




## Create a Role and an Agent Account for REST API Calls

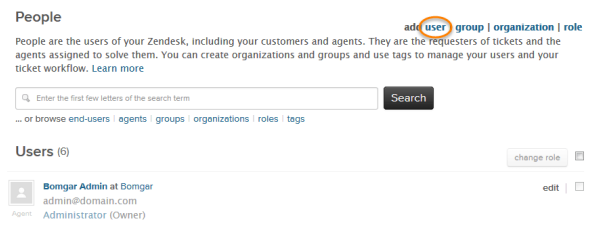
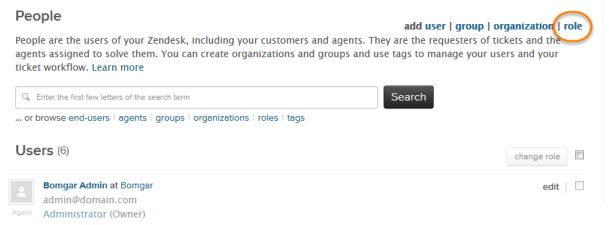
1. Click the **Admin** (gear) icon in the left navigation area to open the **Admin Home** menu.



2. Under **Manage > People**, click **Add Role**.

 **Note:** If your Zendesk plan does not support the creation of new roles, skip to step 4 and add the user to the **Administrator** role.

3. Create a role named **API Only** with the following permissions:
  - a. Tickets > What kind of tickets can this agent access? - **All**
  - b. Tickets > Can edit ticket properties? - **Yes**
  - c. Tickets > Can edit ticket tags? - **Yes**
  - d. People > May this user view lists of user profiles? - **Can view all users in your account**
  - e. Use defaults for all other permissions
4. Under **Manage > People** click **Add User**.
5. Create a new user named **BeyondTrust API User** (or whatever name you prefer) with the **API Only** role.
6. Verify the new API account via email.





# Configure BeyondTrust Remote Support for Integration with Zendesk

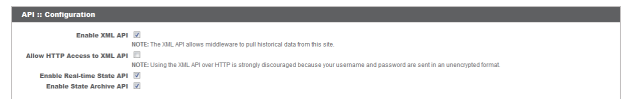
Several configuration changes are necessary on the Secure Remote Access Appliance to integrate with Zendesk. You must make these changes on each appliance for which you intend to create a plugin configuration, described in "[Configure Zendesk for Integration with BeyondTrust Remote Support](#)" on page 5.

All of the steps in this section take place in the BeyondTrust **/login** administrative interface. Access your BeyondTrust interface by going to the hostname of your Secure Remote Access Appliance followed by **/login** (e.g., <https://support.example.com/login>).

## Verify That the API Is Enabled

This integration requires the BeyondTrust XML API to be enabled. This feature is used by the BeyondTrust Middleware Engine to communicate with the BeyondTrust APIs.

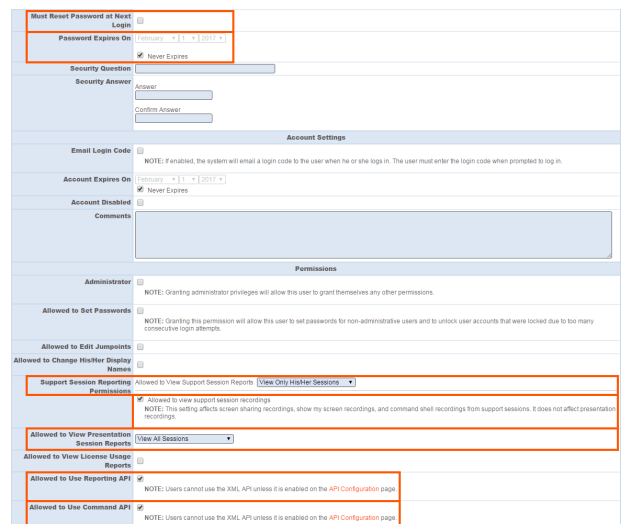
Go to **/login > Management > API Configuration** and verify that **Enable XML API** is checked.



## Create an API Service Account - BeyondTrust 16.1 and Earlier

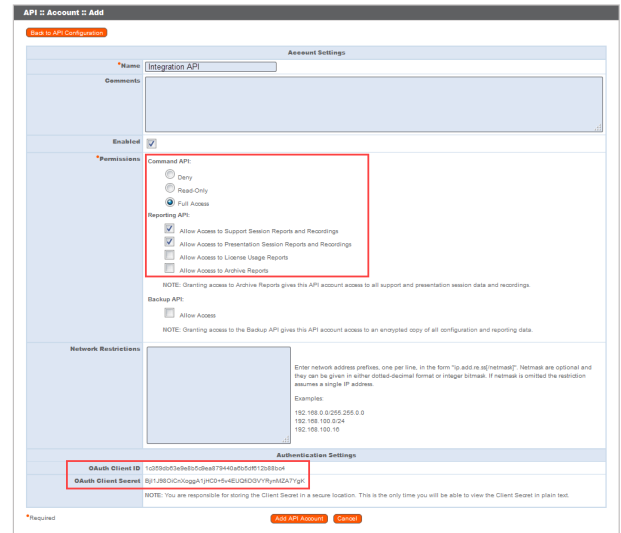
The API user account is used from within the integration to make BeyondTrust Command API calls to BeyondTrust.

1. Go to **/login > Users & Security > Users**.
2. Click **Create New User** and name it **Integration** or something similar.
3. Leave **Must Reset Password at Next Login** unchecked.
4. Set **Password Expires On** to **Never Expires**.
5. Set **Allowed to View Support Session Reports** to **View All Sessions**.
6. Check **Allowed to view support session recordings**.
7. Set **Allowed to View Presentation Session Reports** to **View All Sessions**.
8. Check **Allowed to Use Reporting API** and **Allowed to Use Command API**.
9. Scroll to the bottom and save the account.



## Create an API Service Account - BeyondTrust 16.2 and Later

1. Go to **Management > API Configuration** and create a new API account.
2. Under **Permissions**, check **Full Access** to the **Command API**.
3. For the **Reporting API**, check **Allow Access to Support Session Reports and Recordings** and **Allow Access to Presentation Session Reports and Recordings**.
4. Be sure to copy the values for both the **OAuth Client ID** and **OAuth Client Secret** for use in a later step.



5. Click **Add API Account** to create the account.

## Add an Outbound Event URL

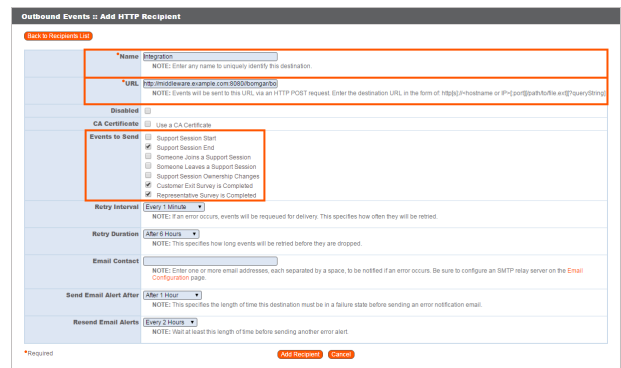
1. Go to **/login > Management > Outbound Events**.
2. Click **Add New HTTP Recipient** and name it **Integration** or something similar.
3. Enter the URL to use:

- If using an appliance ID of "default":  
`http://<middleware-host>:<port>/ERSPost`. The default port is 8180.
- If using an appliance ID other than "default":  
`http://<middleware-host>:<port>/ERSPost?appliance=<appliance-id>` where `<middleware-host>` is the hostname where the BeyondTrust Middleware Engine is installed. The default port is 8180. The `<appliance-id>` is an arbitrary name, but note the value used, as it is entered later in the plugin configuration. This name accepts only alphanumeric values, periods, and underscores.

4. Scroll to **Events to Send** and check the following events:

- **Support Session End**
- **Customer Exit Survey is Completed**
- **Representative Survey is Completed**
- **Someone Joins a Support Session (Optional)**

5. Scroll to the bottom and click **Add Recipient**.



- Now, the list of outbound events should contain the event just added. The **Status** column displays a value of **OK** if communication is working. If communication is not working, the **Status** column displays an error which you can use to repair communication.



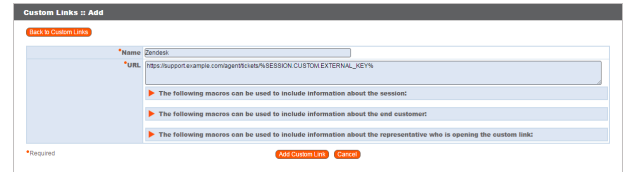
| Name            | Disabled | URL                             | Events to Send  | Status | Actions                                     |
|-----------------|----------|---------------------------------|---|--------|---|
| Session Counter | Yes      | http://info.example.com/session | Support Session Start   | OK     | <a href="#">Edit</a> <a href="#">Delete</a> |
| Survey Page     | Yes      | http://info.example.com/survey  | Customer Exit Survey is Completed<br>Representative Survey is Completed | OK     | <a href="#">Edit</a> <a href="#">Delete</a> |

## Add a Custom Link

BeyondTrust custom links can be configured to allow representatives to quickly access the Zendesk item that is associated with the session.

### BeyondTrust 15.1 and later

- Browse to **Rep Console > Custom Links**.
- Under **Rep Console :: Custom Links**, click **Create New Custom Link**.
- Enter a name for the link, and then set the URL to `https://support.example.com/agent/tickets/%SESSION.CUSTOM.EXTERNAL_KEY%` where `support.example.com` is the Zendesk instance name. If needed, you can use any of the available macros to customize the link according to your specifications.
- Click **Add Custom Link** to save the new link.



**Custom Links :: Add**

[Add New Custom Link](#)

\*Name: Zendesk

\*URL: `https://support.example.com/agent/tickets/%SESSION.CUSTOM.EXTERNAL_KEY%`

The following macros can be used to include information about the session:

The following macros can be used to include information about the end customer:

The following macros can be used to include information about the representative who is opening the custom link:

\*Required

[Add Custom Link](#) [Cancel](#)

### BeyondTrust 15.0 and earlier

- Browse to **Configuration > Options > Representative Console :: Custom Link**.
- Set the URL to `https://support.example.com/agent/tickets/%SESSION.CUSTOM.EXTERNAL_KEY%` where `support.example.com` is the Zendesk instance name.
- Click **Save**.

# Configure the Zendesk Plugin for Integration with BeyondTrust Remote Support

Now that you have configured Zendesk and the Secure Remote Access Appliance, deploy and configure the Zendesk plugin. For additional information about working with the BeyondTrust Middleware Engine, please see the [BeyondTrust Middleware Engine Configuration](http://www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine) document at [www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine](http://www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine).

1. Copy the provided plugin zip file to the server hosting the BeyondTrust Middleware Engine.
2. Extract the plugin zip file to the **Plugins** folder in the directory where the BeyondTrust Middleware Engine is installed.
3. Restart the BeyondTrust Middleware Engine Windows service.
4. From the server, launch the middleware administration tool. The default URL is **http://127.0.0.1:53231**.
5. The **Zendesk Plugin** shows in the list of plugins. Click the clipboard icon to add a new configuration.

## Secure Remote Access Appliance

The first portion of the plugin configuration provides the necessary settings for communication between the plugin and the Secure Remote Access Appliance. The configuration sections include:

1. **Plugin Configuration Name:** Any desired value. Because multiple configurations can be created for a single plugin, allowing different environments to be targeted, provide a descriptive name to indicate how this plugin is to be used.
2. **Appliance Id:** This can be left as **Default** or can be given a custom name. This value must match the value configured on the outbound event URL in the Secure Remote Access Appliance. If outbound events are not being used, this value is still required, but any value may be used.
3. **Secure Remote Access Appliance Host Name:** The hostname of the Secure Remote Access Appliance. Do not include `https://` or other URL elements.
4. **BeyondTrust Integration API OAuth Client ID:** When using API accounts in BeyondTrust Remote Support 16.2.1 or newer, this field should contain the Client ID of the OAuth account.
5. **BeyondTrust Integration API OAuth Client Secret:** When using API Accounts available in BeyondTrust Remote Support 16.2.1 or newer, this field should contain the client Secret of the OAuth account.
6. **BeyondTrust Integration API User Name:** If using a BeyondTrust Remote Support version prior 16.2.1, this field should contain the username of the API service account created on the Secure Remote Access Appliance.
7. **BeyondTrust Integration API Password:** If using a BeyondTrust Remote Support version prior 16.2.1, this field should contain the password of the above user.
8. **Locale Used for BeyondTrust API Calls:** This value directs the Secure Remote Access Appliance to return session data in the specified language.
9. **Disabled:** Enable or disable this plugin configuration.



10. **Allow Invalid Certificates:** Leave unchecked unless there is a specific need to allow. If enabled, invalid SSL certificates are allowed in calls performed by the plugin. This would allow, for example, self-signed certificates. This is not recommended in production environments.
11. **Use Non-TLS Connections:** Leave unchecked unless it is the specific goal to use non-secure connections to the Secure Remote Access Appliance. If checked, TLS communication is disabled altogether. If non-TLS connections are allowed, HTTP access must be enabled on the BeyondTrust **/login > Management > API Configuration** page. Using non-secure connections is discouraged.



*Note: When using OAuth authentication, TLS cannot be disabled.*

12. **Outbound Events Types:** Specify which events the plugin processes when received by the middleware engine. Keep in mind that any event types selected here must also be configured to be sent in BeyondTrust. The middleware engine receives any events configured to be sent in BeyondTrust but passes them off to the plugin only if the corresponding event type is selected in this section.
  - a. **Support Session End**
  - b. **Customer Exit Survey is Completed**
  - c. **Representative Survey is Completed**
13. **Polling Event Types:** If network constraints limit connectivity between the Secure Remote Access Appliance and the middleware engine such that outbound events cannot be used, an alternative is to use polling. The middleware engine regularly polls the Secure Remote Access Appliance for any sessions that have ended since the last session was processed. At this time, only the **Support Session End** event type is supported.



*Note: One caveat to polling behavior versus the use of outbound events is that if a session has ended but the customer exit survey has not yet been submitted within the same polling interval, the customer exit survey is not processed. This does not apply to representative surveys since the session is not considered to be complete if a representative survey is still pending.*

14. **Polling Interval:** Enter only if polling is used. This determines how often the middleware engine polls the Secure Remote Access Appliance for sessions that have ended.
15. **Retry Attempt Limit:** Enter the number of retries that can be attempted if the plugin fails to process an event.
16. **Retry Outbound Event Types:** Specify which outbound events the plugin retries if it fails to process the event.
17. **Retry Polling Event Types:** Specify which polling events the plugin retries if it fails to process the event.

## Zendesk Server Instance

The remainder of the plugin configuration provides the necessary settings for communication between the plugin and the Zendesk instance. The configuration settings include:

1. **Zendesk API URL:** The external API services URL for the Zendesk instance (e.g., `https://example.zendesk.com`).
2. **Zendesk API Username:** The username of the API account.
3. **Zendesk API Token:** A token created in Zendesk for API connectivity.

After saving the configuration, click the test icon next to the new plugin configuration. No restart is needed.

## Report Templates

On the BeyondTrust Middleware Engine server, in the `<install dir>\Plugins\<integration>\Templates` folder, there are multiple files ending with `*.hbs`. These files are used by the plugin to format the textual session report and exit surveys that are added to the corresponding ticket each time a BeyondTrust session ends or each time a survey is submitted. The templates can be edited if desired.



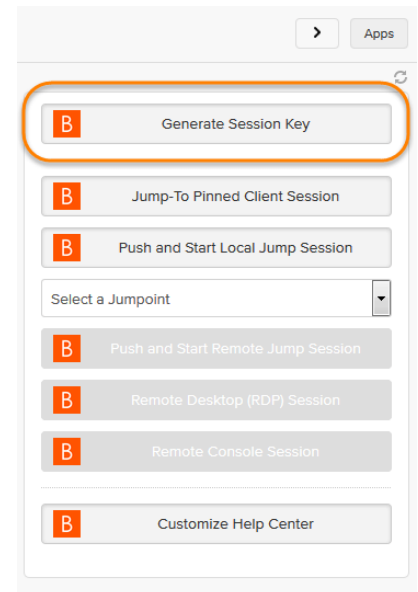
**Note:** *If changes need to be made to a template, it is a good idea to first back up the original in case the changes ever need to be reverted.*

For additional information on Handlebars templates, see [handlebarsjs.com](http://handlebarsjs.com).

# Use Cases for the Zendesk Integration with BeyondTrust Remote Support

## Generate Session Key

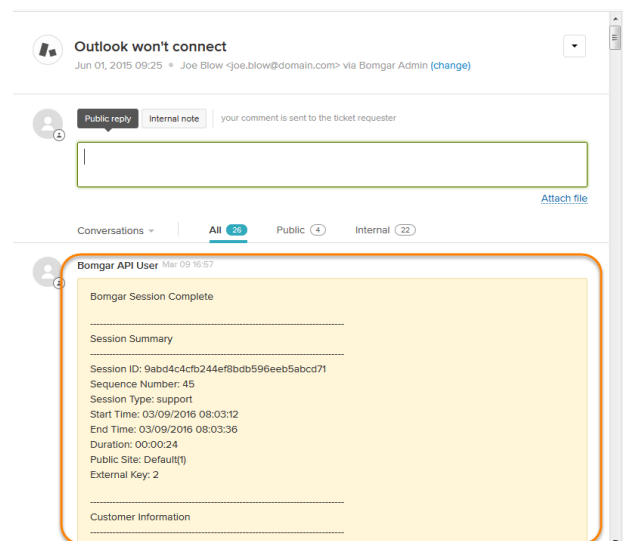
Support staff can generate a session key that can be given to the end user over the phone or via email to initiate a support session that is automatically associated with the selected ticket.



## Import BeyondTrust Session Data into Ticket

Once the session ends, the ticket is automatically updated with information gathered during the session, including:

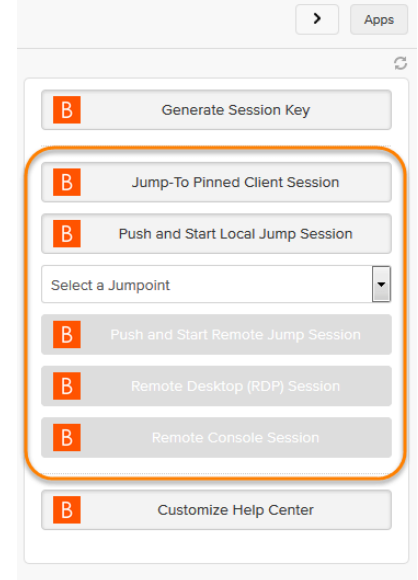
- **Chat Transcript** (including files transferred, special actions, and other events)
- **System Information** (the General section plus other select details such as disk, memory, and network)
- **Session Notes**
- **Surveys** (customer and representative)



## Jump to Configuration Item

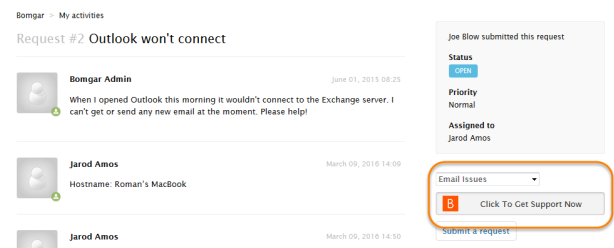
Support staff can leverage BeyondTrust Jump Technology to access a configuration item associated with a ticket directly from the Zendesk ticket. The following Jump types are available:

- **Jump Client** (Pinned Client)
- **Local Jump** (Push and Start Local)
- **Remote Jump** (Push and Start Remote)
- **Remote Desktop Protocol (RDP)**
- **Shell Jump** (Remote Console)



## Click-to-Chat for Help Center Users

Help Center users can open their submitted tickets and start a chat support session directly from the Zendesk ticket. This allows the user the quickest path to resolution while also providing the representative with the necessary context to assist the user. Sessions can be elevated to full support sessions if enabled and when necessary.



## Access Ticket from Representative Console

Using BeyondTrust's custom links ability, a representative can access the associated ticket directly from within the representative console. This saves time searching for the ticket in Zendesk and provides the representative with any issue details, history, or other context to help quickly resolve the issue.