

BOMGAR™

Autotask Integration Guide

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Bomgar Integration with Autotask

IMPORTANT!

You must purchase this integration separately from both your Bomgar software and your Autotask solution. For more information, contact Bomgar sales.

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

The Autotask integration with Bomgar Remote Support provides the following functionality:

- A Bomgar support session can be initiated from within Autotask.
- At the end of a session, the incident can be updated with session information, including a chat transcript, system information, session notes, and customer and representative surveys.

Prerequisites for the Bomgar Remote Support Integration with Autotask

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

- Bomgar Remote Support: 14.x and newer
- Autotask: Current release

Network Considerations

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

Outbound From	Inbound To	TCP Port #	Purpose
Bomgar Middleware Engine Server	Autotask	443	API calls from the Bomgar Middleware Engine server.
Bomgar Middleware Engine Server	Bomgar Appliance	443	API calls from the Bomgar Middleware Engine server.
Bomgar Appliance	Bomgar Middleware Engine Server	8180 (default) 443 (optional)	The Bomgar Middleware Engine server receives outbound events from the appliance. However, if polling is used instead of outbound events, then this port does not have to be open.

Prerequisite Installation and Configuration

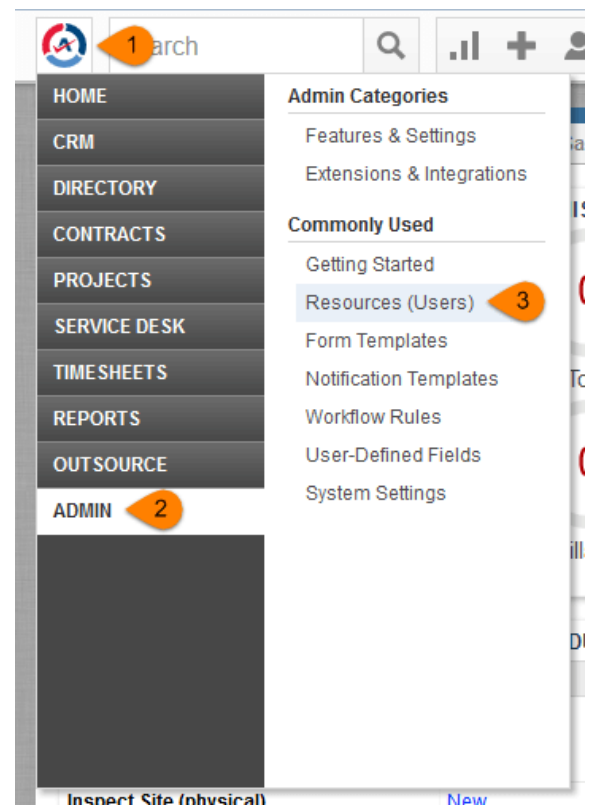
The Autotask integration is a Bomgar Middleware Engine plugin. To install the Bomgar Middleware Engine, follow the instructions in the [Bomgar Middleware Engine Configuration](#) document at www.bomgar.com/docs/remote-support/how-to/integrations/middleware-engine.

Configure Autotask for Integration with Bomgar Remote Support

The Autotask integration includes a few LiveLinks which must be created in Autotask for generating session keys and launching a Jump session to a Configuration Item.

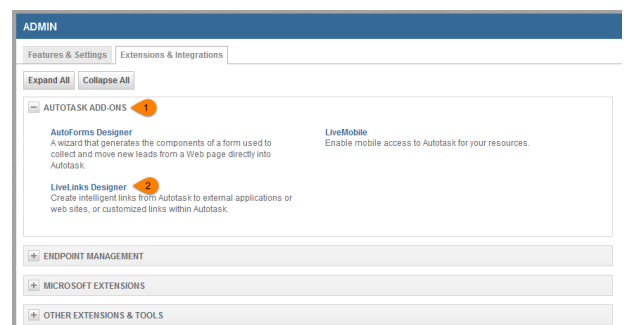
Create an API User

1. In Autotask, go to **Admin > Resources (Users)**.
2. Click the **New** button.
3. Create a user with the **System Administrator** security level.

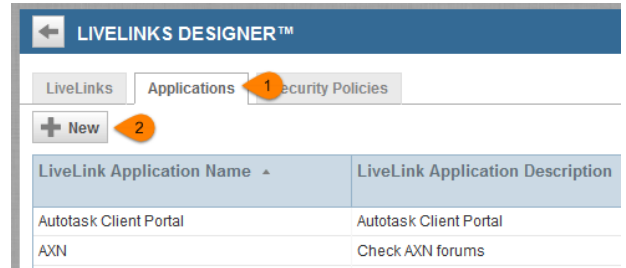


Create Bomgar Application

1. In Autotask, go to **Admin > Extensions & Integrations > Autotask Add-ons > LiveLinks Designer**.

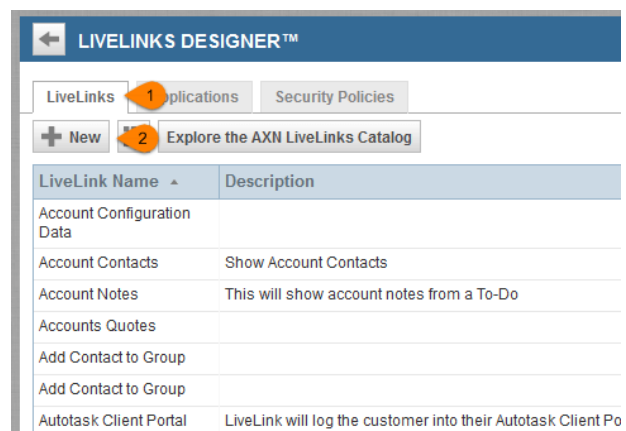


- On the **Applications** tab, click the **New** button.
- Enter **Bomgar** as the application name.
- Click **Save and Close**.



Create the Bomgar Jump LiveLink

- In Autotask, go to **Admin > Extensions & Integrations > Autotask Add-ons > LiveLinks Designer**.
- On the **LiveLinks** tab, click the **New** button.

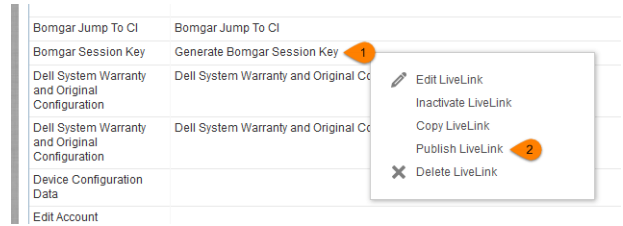


- Create the LiveLink with the following settings:

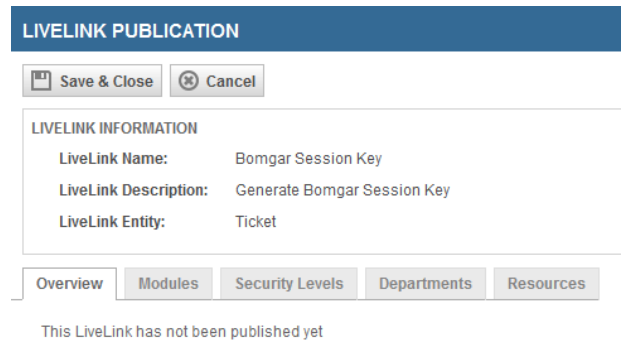
Field Name	Field Value
LiveLink Name	Bomgar Jump To CI
Label	Bomgar Jump To CI
Description	Bomgar Jump To CI
Active	[checked]
Category	Service Desk
LiveLink Application Name	Bomgar
Entity	Ticket
Base URL	<code>https://<bomgar-appliance-host>/api/client_script.ns</code>
QueryString Values	<code>?type=rep&operation=generate&action=start_pinned_client_session&search_string=<UDF-Device Name (ATG_InstalledProduct)>&session.custom.external_key=<TICKETID></code>

- On the **Configuration** tab, ensure both **Ticket Details Window - Service Desk** and **Ticket Grid - Service Desk** are checked.

5. Click **Save and Close**.
6. Right-click the LiveLink in the list and select **Publish LiveLink**.



7. Using the **Security Levels**, **Departments**, and/or **Resources** tabs, select the appropriate groups or users that should be able to view and use the LiveLink.
8. Click **Save and Close** to publish the LiveLink.



Create the Bomgar Session Key LiveLink

1. Create another LiveLink with the following settings:

Field Name	Field Value
LiveLink Name	Bomgar Session Key
Label	Bomgar Session Key
Description	Generate Bomgar Session Key
Active	[checked]
Category	Service Desk
LiveLink Application Name	Bomgar
Entity	Ticket
Base URL	https://<bomgar-appliance-host>/api/client_script.ns
Querystring Values	?type=rep&operation=generate&action=generate_session_key&session.custom.external_key=<TICKETID>

2. On the **Configuration** tab, ensure both **Ticket Details Window - Service Desk** and **Ticket Grid - Service Desk** are checked.
3. Click **Save and Close**.
4. Follow the same steps as with the previous link to select the appropriate groups and users, and then publish the LiveLink.

Configure Bomgar Remote Support for Integration with Autotask

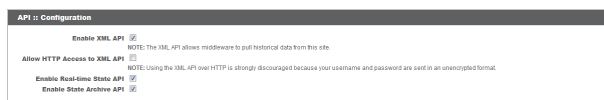
Several configuration changes are necessary on the Bomgar Appliance to integrate with Autotask. You must make these changes on each appliance for which you intend to create a plugin configuration, described in "[Configure the Autotask Plugin for Integration with Bomgar Remote Support](#)" on page 11.

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

Verify That the API Is Enabled

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

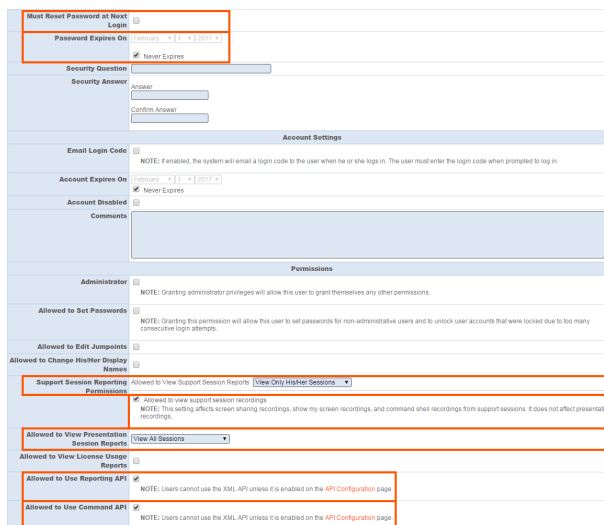
Go to `/login > Management > API Configuration` and verify that **Enable XML API** is checked.



Create an API Service Account - Bomgar 16.1 and Earlier

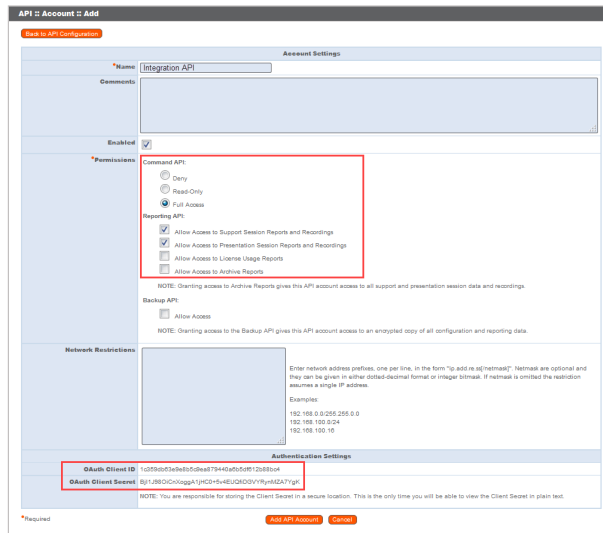
The API user account is used from within the integration to make Bomgar Command API calls to Bomgar.

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 - Bomgar 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

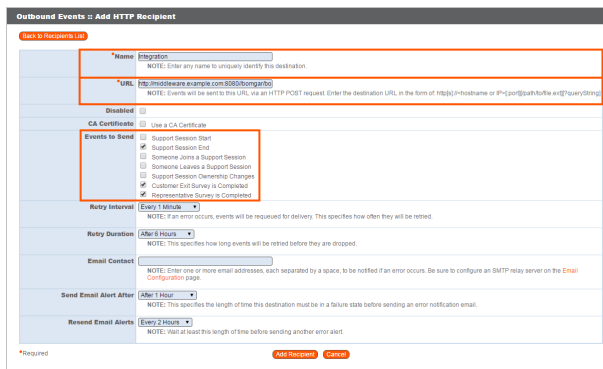
1. Go to **/login > Management > Outbound Events**.
2. Click **Add New HTTP Recipient** and name it **Integration** or something similar.
3. Enter the URL to use:

- 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 Bomgar 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://mfb.example.com/session	Support Session Start	OK	Edit Delete
Survey Page	Yes	http://mfb.example.com/survey	Customer Exit Survey is Completed Representative Survey is Completed	OK	Edit Delete

Add a Custom Link

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

Bomgar 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://ww<#>.autotask.net/Autotask/Views/ServiceDesk/ServiceDeskTicket/service_ticket.aspx?ticketID=%SESSION.CUSTOM.EXTERNAL_KEY%` where `<#>` is the customer's Autotask instance number. 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.

Bomgar 15.0 and earlier

- Browse to **Configuration > Options > Representative Console :: Custom Link**.
- Set the URL to `https://ww<#>.autotask.net/Autotask/Views/ServiceDesk/ServiceDeskTicket/service_ticket.aspx?ticketID=%SESSION.CUSTOM.EXTERNAL_KEY%` where `<#>` is the customer's Autotask instance number.
- Click **Save**.

Configure the Autotask Plugin for Integration with Bomgar Remote Support

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

1. Copy the provided plugin zip file to the server hosting the Bomgar Middleware Engine.
2. Extract the plugin zip file to the **Plugins** folder in the directory where the Bomgar Middleware Engine is installed.
3. Restart the Bomgar 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 **Autotask Plugin** shows in the list of plugins. Click the clipboard icon to add a new configuration.

Bomgar Appliance

The first portion of the plugin configuration provides the necessary settings for communication between the plugin and the Bomgar 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 Bomgar Appliance. If outbound events are not being used, this value is still required, but any value may be used.
3. **Bomgar Appliance Host Name:** The hostname of the Bomgar Appliance. Do not include `https://` or other URL elements.
4. **Bomgar Integration API OAuth Client ID:** When using API accounts in Bomgar Remote Support 16.2.1 or newer, this field should contain the Client ID of the OAuth account.
5. **Bomgar Integration API OAuth Client Secret:** When using API Accounts available in Bomgar Remote Support 16.2.1 or newer, this field should contain the client Secret of the OAuth account.
6. **Bomgar Integration API User Name:** If using a Bomgar Remote Support version prior 16.2.1, this field should contain the username of the API service account created on the Bomgar Appliance.
7. **Bomgar Integration API Password:** If using a Bomgar Remote Support version prior 16.2.1, this field should contain the password of the above user.
8. **Locale Used for Bomgar API Calls:** This value directs the Bomgar 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.

The screenshot shows the configuration interface for the Bomgar plugin. It includes the following sections:

- Plugin Configuration Name:** A dropdown menu with "QA Environment" selected.
- Appliance Id:** A dropdown menu with "default" selected.
- Bomgar Appliance Host Name:** A text input field with "support.example.com" entered.
- Bomgar Integration API OAuth Client ID:** A text input field with a long alphanumeric string.
- Bomgar Integration API OAuth Client Secret:** A text input field with a long alphanumeric string.
- Bomgar Integration API User Name:** A text input field.
- Bomgar Integration API Password:** A text input field.
- Locale Used for Bomgar API Calls:** A dropdown menu with "English" selected.
- Disabled:** A checkbox labeled "Disabled" which is checked.
- Allow Invalid Certificates:** A checkbox which is unchecked.
- Outbound Event Types:** A list of checkboxes for "Support Session End", "Customer Exit Survey is Completed", "Representative Survey is Completed", and "Someone Joins a Support Session".
- Support Session End:** A checkbox which is checked.
- Customer Exit Survey is Completed:** A checkbox which is checked.
- Representative Survey is Completed:** A checkbox which is checked.
- Someone Joins a Support Session:** A checkbox which is unchecked.
- Support Session End:** A checkbox which is checked.
- Polling Interval (in minutes):** A text input field.

11. **Use Non-TLS Connections:** Leave unchecked unless it is the specific goal to use non-secure connections to the Bomgar Appliance. If checked, TLS communication is disabled altogether. If non-TLS connections are allowed, HTTP access must be enabled on the Bomgar **/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 Bomgar. The middleware engine receives any events configured to be sent in Bomgar 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 Bomgar Appliance and the middleware engine such that outbound events cannot be used, an alternative is to use polling. The middleware engine regularly polls the Bomgar 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 Bomgar 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.

Autotask Instance

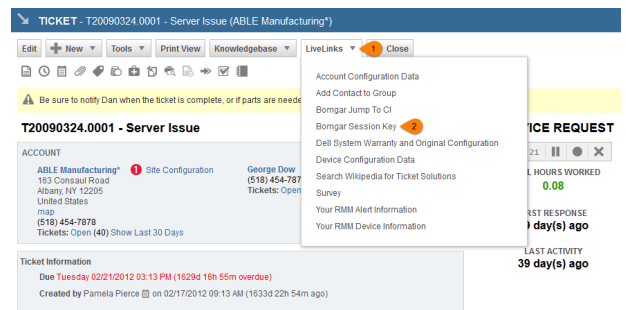
The remainder of the plugin configuration provides the necessary settings for communication between the plugin and the Autotask instance. The configuration settings include:

1. **Autotask Services URL:** The services URL for the Autotask instance (e.g., <https://web-services<#>.autotask.net/at services/1.5/atws.asmx>, where <#> is the same number found in the URL used to access the Autotask web interface (e.g., <https://ww<#>.autotask.net>).

Use Cases for the Autotask Integration with Bomgar Remote Support

Generate Session Key

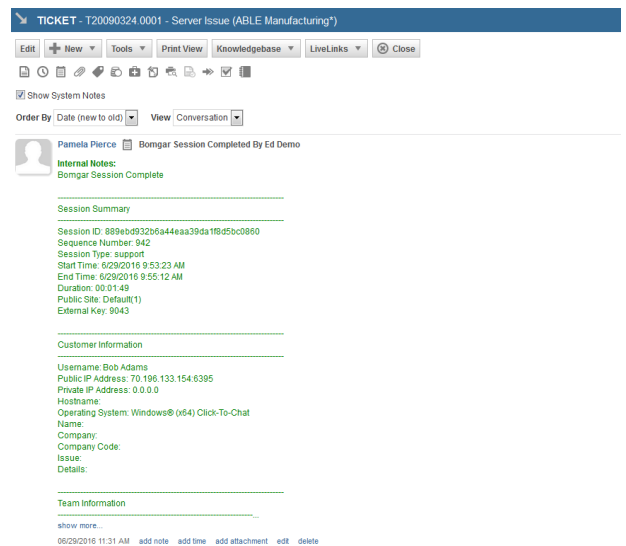
Support staff can generate a session key that can be given to the end user over the phone or via email to initiate a support session that is automatically associated with the selected ticket.



Import Bomgar Session Data into Ticket

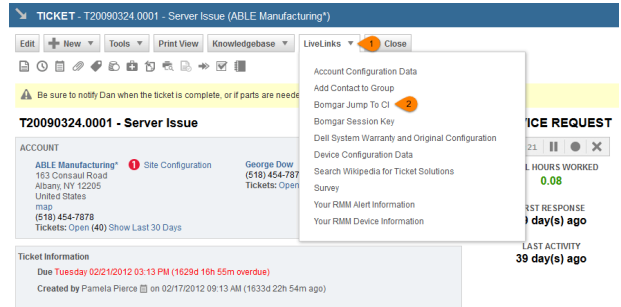
Once the session ends, the ticket is automatically updated with information gathered during the session, including:

- **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 Bomgar Jump Technology to access a configuration item associated with a ticket directly from the Autotask ticket.

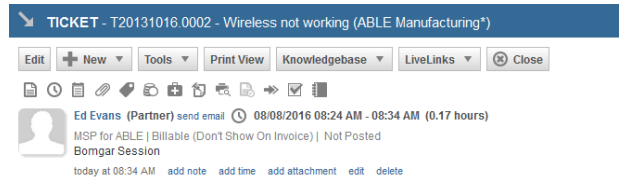


Access Ticket from Representative Console

Using Bomgar'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 Autotask and provides the representative with any issue details, history, or other context to help quickly resolve the issue.

Auto-Time Entry Creation

If desired, a time entry can be created and added to the associated ticket once a session ends. The time entry uses the same start and end time as the actual session for accurate time tracking, as well as associating it with the primary representative from the session.



Automatic Ticket Creation

The automatic ticket creation feature does require a services engagement to implement for each customer. However, the fact that this functionality is even possible without a large custom development effort can be of great benefit to simplifying workflows and reducing the number of clicks necessary for a support representative.