BOMGAR REMOTE SUPPORT

Integration and Setup Guide

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www.agiloft.com/documentation/bomgar-setup.pdf

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BOMGAR REMOTE SUPPORT INTEGRATION

This document guides you through the setup and use of Bomgar integration with an Agiloft Knowledgebase. Bomgar is a secure remote support application that allows technicians to log in to customer computers, phones, and tablets to troubleshoot and work on issues.

Bomgar integration is available in Agiloft release 8.0 (2015_02) or higher.

Use Case

Bomgar facilitates supporting customers on remote computers running Windows, Mac, or various Linux distributions. Bomgar supports a variety of mobile devices as well, including Android, iPhone, iPad, BlackBerry, and Windows Mobile. Refer to http://www.bomgar.com/products/features for more details.

When Bomgar integration is configured, members of the Support Team can create a Bomgar support session from within the Agiloft interface using an action button. Then, the technician shares the unique PIN code or URL with the customer who requires remote support. When the session ends, details are sent back to Agiloft to create a record of customer support sessions, including links to view or download chat transcripts and session details.

***Note**: Technicians **must** end the session in Bomgar to send the details back to Agiloft.*

INITIAL SETUP

This section describes the initial administrator setup required to use Bomgar. In brief, you will:

1. Enable Bomgar within Agiloft to add the necessary background table and data structures.
2. Enter details of the configuration to enable communication between Agiloft and Bomgar.
3. Add fields to the process table (typically Support Cases) to capture and hold Bomgar data, including a custom action button to generate Bomgar Session Keys.

Prerequisites

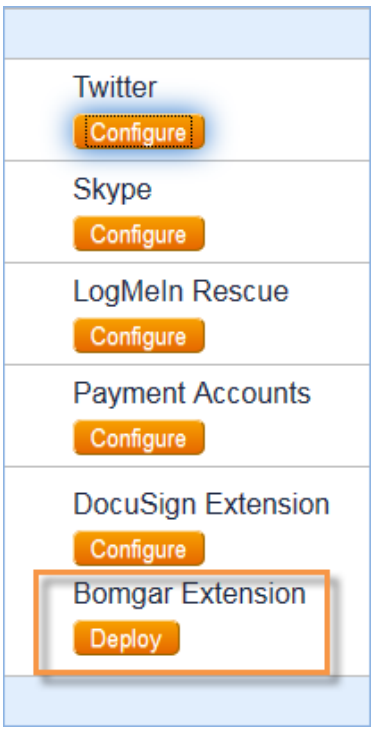
To integrate with Bomgar you will need:

1. A licensed installation of the Bomgar Appliance and Representative Consoles (each technician/support rep has a separate RC).
2. An administrator-level username and password to connect to the Bomgar Appliance.
3. The FQDN/IP address of your Bomgar Appliance.

Deploy and Configure the Bomgar Extension

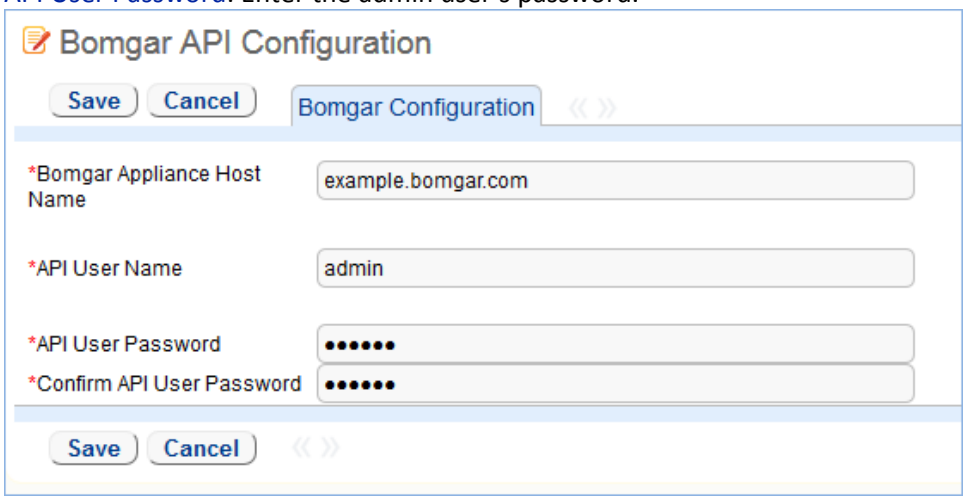
To complete the following steps, log in to your KB as an administrator.

1. Go to **Setup > Integration.** Under Bomgar Extension, click Deploy. It may take a few minutes for the system to add the Bomgar Session Details table.



2. When deployment is complete, you will see the Bomgar Configuration screen (**Setup > Integration > Configure Bomgar Extension**). Supply the configuration details as follows:

a. Bomgar Appliance Host Name: Enter the FQDN/IP address of the Bomgar Appliance, e.g. `mycompany.bomgar.com`.
b. API User Name: Enter an admin-level Bomgar username to generate session keys and view reports.
c. API User Password: Enter the admin user's password.



***Note**: Some special URL characters are reserved and will not work in the Bomgar API password. For more information on this subject, see https://en.wikipedia.org/wiki/Percent-encoding*

3. Save changes.

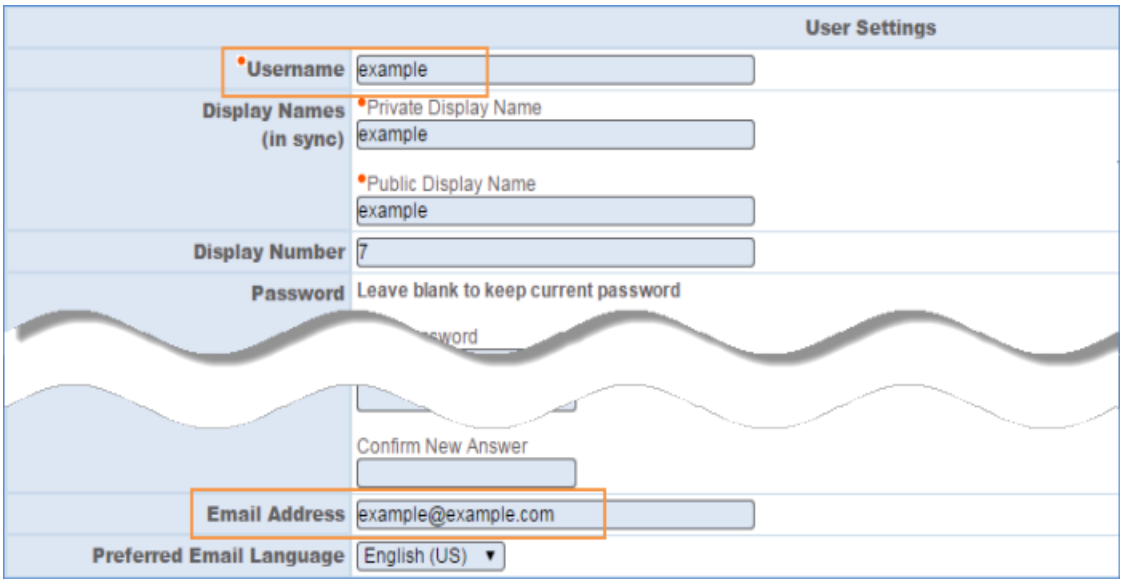
User Setup Requirements

Technicians who will launch support sessions must exist as users in both Bomgar and Agiloft for the system to confirm their identity and assign sessions.

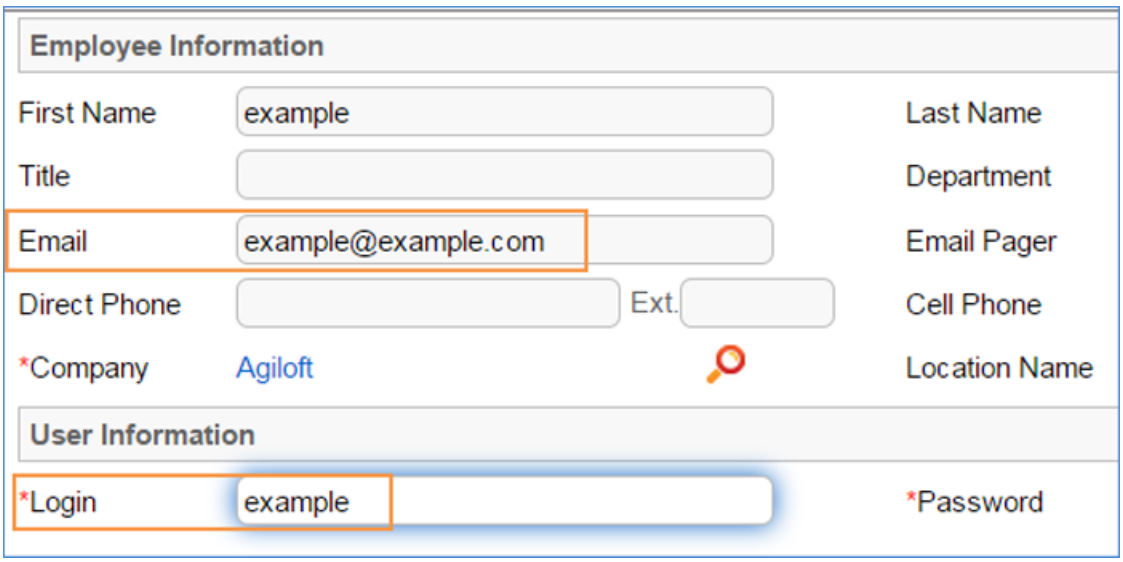
One of the following requirements must be met:

- The Username in Bomgar matches the Login in Agiloft.
- The Email Address in Bomgar matches the Email Address in Agiloft.

To confirm user settings, log in to the Bomgar admin portal (e.g., `mycompany.bomgar.com/login`) and create or edit a user on the Users & Security tab.



Then confirm it matches the user record in Agiloft:



Modify the Support Table

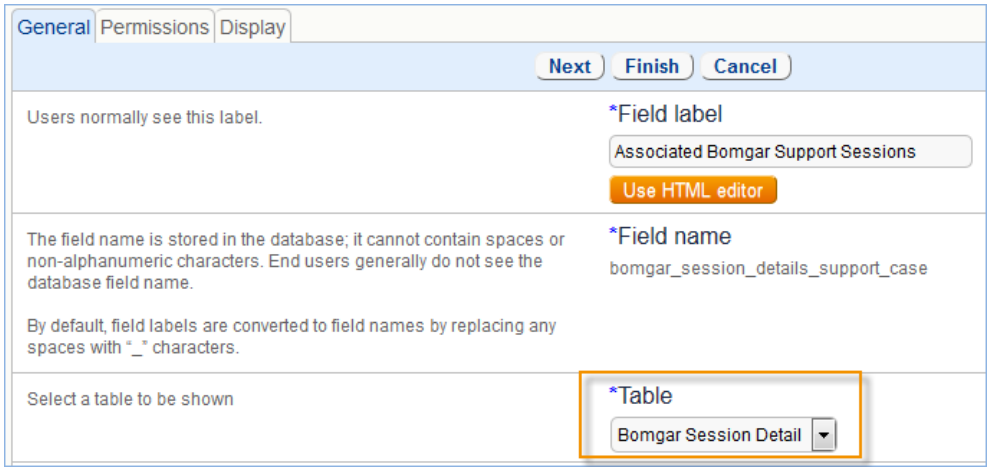
You will need to create a few fields in whichever table staff will work on tickets and launch Bomgar sessions, most commonly the Support Case or Helpdesk Case table.

The following fields are required:

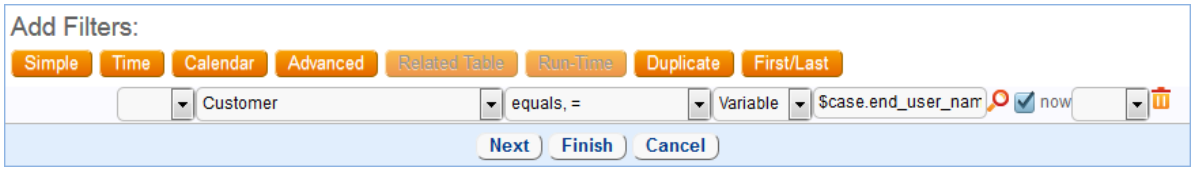
1. Bomgar Session Key: Create a *text* or *short text* field to hold the Bomgar session pin.
2. Session Key Expiration: Create a *date/time* field to hold the Bomgar pin expiration.
3. Bomgar Session URL: Create a *short text* field to hold the session URL.

4. Bomgar Support Sessions: Create an *embedded search result*.

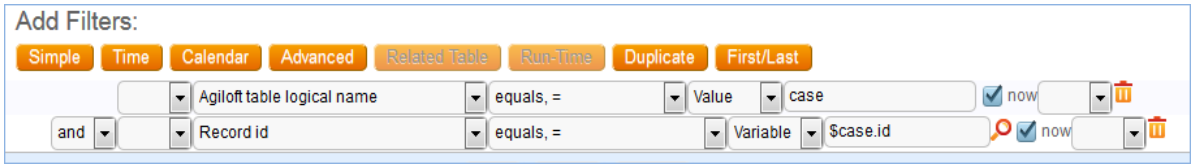
   a. On the General tab, enter a Field Label and name. From the Table drop-down, select Bomgar Session Detail.



   b. On the Permissions tab, chose the option to use a saved search. We recommend creating a search based on the current customer name, so support technicians can see all of the customer's support sessions in the embedded table.



   Alternately, you might want to create a search that shows only support sessions related the current case by filtering on the **logical table name** and the case ID.



   c. On the Display tab, choose or create a view to use. Include any fields you want to see in the Support Case or Helpdesk Case record. We recommend including the primary support technician, links to view the session recording and the session chat transcript, the start and end times, and the session status.

5. Generate Bomgar Key: Create an *action button* to generate the Bomgar session key. This button populates the session key, URL, and expiration, into the fields specified. Configuration of this action button also determines how support sessions are assigned in the Bomgar Appliance.

   a. On the General tab of the field wizard, enter a Field label.

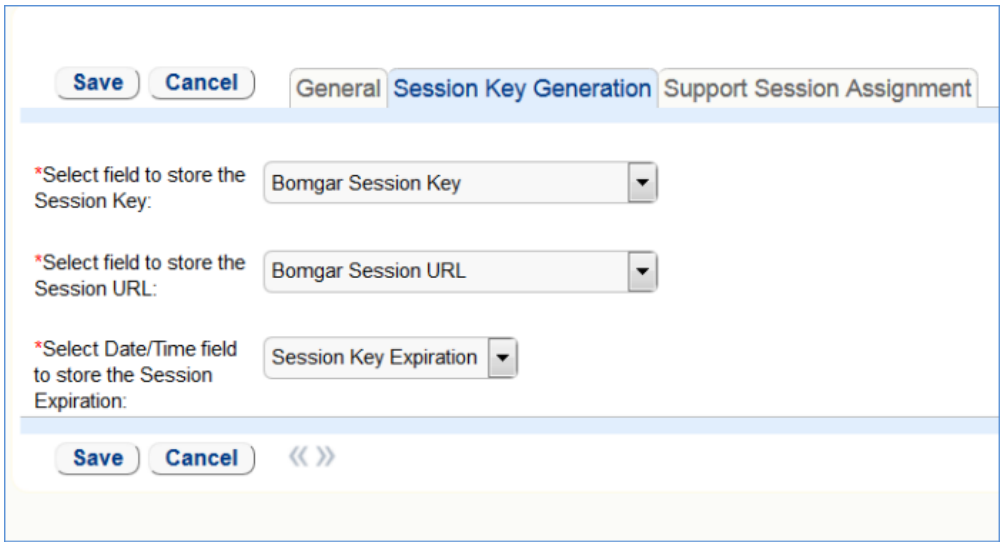
   b. Check Execute Actions, then click Add Action.

   c. In the pop-up window, click Create Bomgar Support Session Key Action.

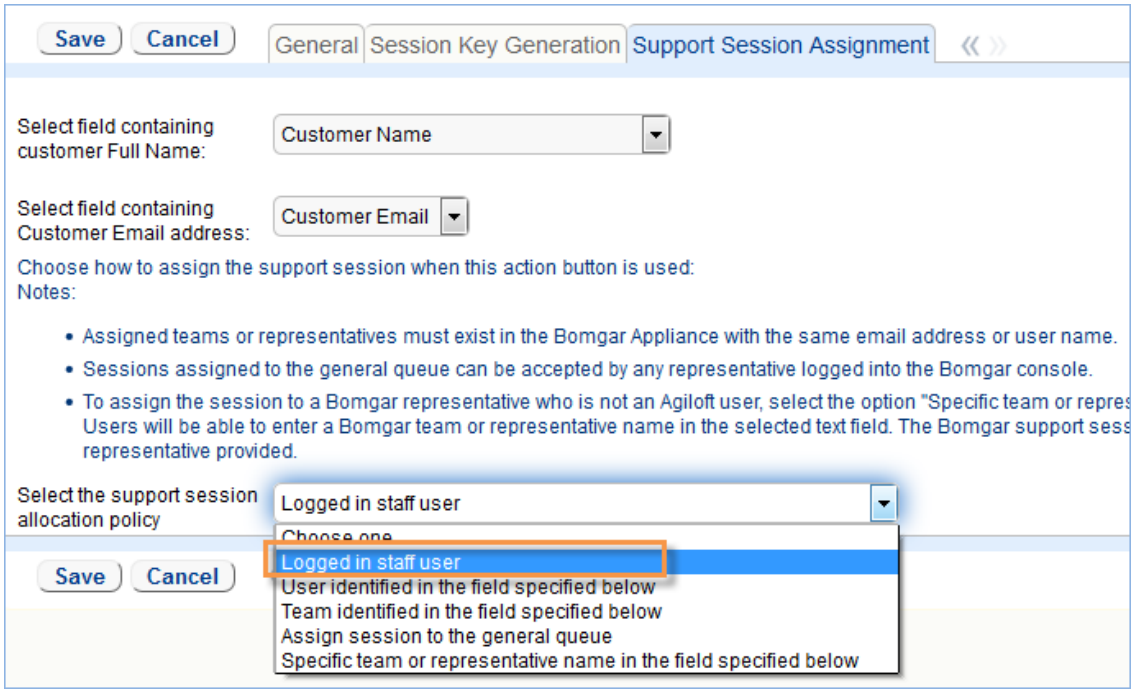
d. In the action wizard:

i. On the General tab, enter an action Name and Description.

ii. On the Session Key Generation tab, choose the three fields from the process table that hold the session key, URL, and session key expiration:



iii. On the Support Session Assignment tab, select the fields holding the customer's name and email address. Then choose an assignment policy. In most situations, we recommend assigning sessions to the logged in staff user. See below for a detailed explanation of assignment options in ASSIGNING SUPPORT SESSIONS.



6. Email Bomgar Session Key: Create an *action button* to email the session pin to the customer. This field is not required, since there are several ways to configure an email action or to share the URL and session key with a customer. Below is our recommended setup:

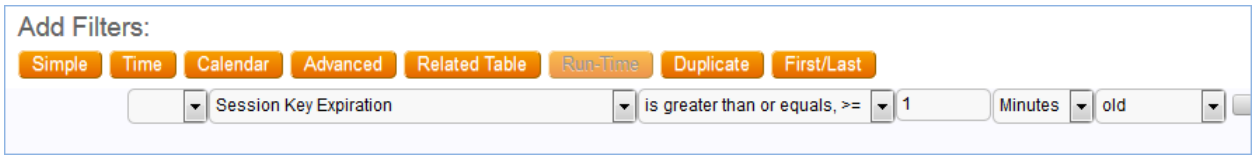
    a. On the General tab of the field wizard, enter a Field label for the button.

    b. Check Execute Actions and click Add Action.

    c. In the action wizard, click Create If-Then-Else Action.

        i. On the General tab, give the action a name.

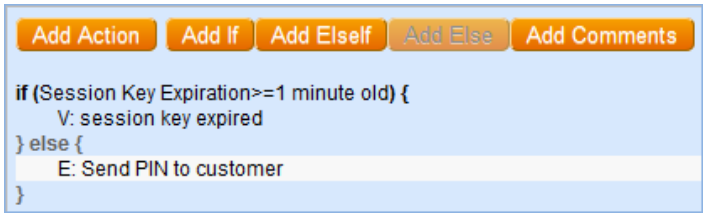
        ii. Before creating the email action, we'll check that the session key is not expired. Click Add If to begin. In the pop-up filter window, click Time. Choose the appropriate options to find session key expiration times greater than one minute old.



        iii. Click Finish to return to the If-then-else wizard.

        iv. Click Add Action and create a *Validate Action* to warn the support technician if the key is expired. Your message will say something like "The session key is expired, please generate a new key." Click Finish to return to the If-then-else wizard.

        v. Click Add Else, then create an *Email Action* that sends the PIN and URL to the support customer. You can modify an existing email template or create a new one to use. Be sure to include field variables in the template to display the URL and session key fields. The completed *If-then-else action* will look similar to:



    d. Finish and save the action and field wizards.

> ***Note**: Instead of using the email key action button, you may share the key and URL by phone, IM, or manual email.*

Assigning Support Sessions

The action button setup determines how the session for which the key and URL are generated is assigned. You can assign Bomgar sessions to the:

1. Logged in staff user: The technician who clicks the Generate Bomgar Session Key and URL button.

2. User identified in the field specified below: Use this option to assign the session to a user field in the record, typically the Assigned Person.

3. Team identified in the field specified below: Use this option to assign the session to an entire team. Any logged in member of the team will be able to accept the session in the Bomgar console. In this case, you will typically choose the Assigned Team field.

4. Assign session to the general queue: With this option, any representative logged into Bomgar can accept the session.

> ***Note**: To use this option, you must log in to the Bomgar Administrative Interface, go to **Configuration > Options,** and check the box to Enable the General Queue.*

5. Specific team or representative name in the field specified below: This option allows you to assign a support session to a user known **only** in Bomgar. You will need another field to hold the custom value. The technician enters the value of a known Bomgar representative or team into the field before clicking the Generate Session Key action button.

Layout and Permissions

Once you have finished adding these fields, add them to the **layout** and set up **permissions**. You can arrange the layout according to your needs. The following permissions are minimally required:

- Support reps need **view** access to the Bomgar Session Details table.
- Support reps need **view own/other** permission to fields in the Bomgar Session Details table (i.e., the fields which appear in the *embedded search result* field).
- Support reps need **view own/other** permission to the relevant Bomgar fields and action buttons in the support table.

You may wish to give additional **view** permissions to customers, such as the ability to view or download the session's chat transcripts.

INITIATING A BOMGAR SESSION

To launch a Bomgar support session from an Agiloft KB by, a technician must:

1. Log into an Agiloft KB and the Bomgar Representative Console.

2. Open an Agiloft support case, often on the phone with a customer.

3. Click the Generate Bomgar Session Key and URL action button.

4. Confirm the Session Key, Session URL, and other fields have populated correctly.

5. Send the session key and URL to the customer via *action button*, phone, chat, IM, or email.

6. Accept the session in the Bomgar Console after the customer receives the key and begins the session.

> ***Note**: Technicians **must** end the session from the Bomgar Representative Console to send the details back to Agiloft.*

Viewing Session Details

To view the details of a Bomgar session, click on the View Details link from the **embedded table** in the record. You can also view the details directly from the session record in the Bomgar Session Details table or in the Bomgar interface itself.

***Note**: Chat and session detail records remain on the Bomgar server for 90 days.*