



Rescue by LogMeIn Integration and Setup

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

RESCUE BY LOGMEIN INTEGRATION

Rescue by LogMeIn, a remote support platform, integrates with Agiloft support desk, allowing technicians to launch support sessions from the staff interface and log in remotely to customer computers. You can then view session details and chat transcripts from within a Support Case record, providing technicians with the necessary information to deliver fully integrated customer service.

Technicians can generate PIN codes from the Agiloft interface, and session details are sent back to Agiloft when the support session is ended from the LogMeIn Technician Console.

The following instructions will help you integrate Agiloft's Support Case table with LogMeIn Rescue.

Setup in Rescue

Sign up for a trial if you don't already have a Rescue by LogMeIn account at <https://www.logmeinrescue.com>.

Enable Posting of Session Details

Note that LogMeIn has two consoles: the Technician Console and the Administration Center. Log in to Rescue at <https://www.logmeinrescue.com> and open the Administration Center.

1. Select a technician group from the left pane.
2. Click the **Settings** tab.



3. Scroll down to the **Exporting session data** section.
4. In the **Post session details to URL when session is ended** field, enter:
`https://{server}/gui2/logmeinSession`
(where {server} is the FQDN/IP address of your Agiloft instance).

Exporting session data

Post session details to URL when session is started by technician:
 Enter a URL your technicians can access, i.e. http://webserver/path

Post session details to URL when session is ended by technician:
 Enter a URL your technicians can access, i.e. http://webserver/path

Post session details: as HTML Form parameters
 as XML data

5. Scroll down and select **Save Changes**.

Locate Company ID and SSO Password

You will need to copy the **Company ID** and the **SSO Password** from the LogMeIn Rescue Administration Center into Agiloft's LogMeIn integration wizard. To find these values:

1. Log in to your Rescue Administration Center.
2. Under **Global Settings > Single Sign-On**, find or create the **SSO Password**.
3. In the next field (**ASP.Net C# server side example**), find the **Company ID**.

Single Sign-On

Only Single Sign-On login allowed (except for the Account Holder):

Enter new SSO password:

Confirm new SSO password:

ASP.Net C# server side example hosted by the customer:

```
ID + "&Password=" + sSSOPassword + "&CompanyID=2387767";
```

Copy code to clipboard

Setup in Agiloft

The required setup to integrate Agiloft and LogMeIn Rescue happens in three stages. First, you will import a **carrierKB** to add structures and automation to your KB. Then, enter the details of your LogMeIn Rescue account into the LogMeIn integration wizard within Agiloft and verify user information. Finally, customize the key components and record layout to your exact needs.

Import the Carrier KB

LogMeIn integration with the Support Case table is automated by importing a **carrier KB** containing the LogmeIn Rescue Sessions background table. To import this table and automation into your KB:

1. Download the carrier KB at https://www.agiloft.com/documentation/Logmein_Carrier_KB.xml.ew.zip

- Unzip the folder and save the **carrierKB** file, `Logmein_Carrier.xml.ew`, to a convenient location on your hard drive.
- In your Agiloft KB, go to **Setup > Sync > Import**.
- On the **Source** tab, click **Browse...** to find and open the file `Logmein_Carrier.xml.ew`:

The screenshot shows a dialog box with two tabs: 'Source' (active) and 'Entity Set'. At the top, there are 'Next' and 'Cancel' buttons. The main area contains the instruction 'Please upload an export file or select a source KB.' On the right, under 'Data Source', the 'Upload an export file (a source KB)' option is selected. Below this, there is a 'Choose File' button, the filename 'Logmein_Carrier_KB.xml', and an 'Upload' button. The 'Transfer from existing KB' option is unselected, with a dropdown menu showing '45783'. Below the dropdown, there are labels for 'Login' and 'Password' with corresponding input fields. At the bottom, there are 'Next' and 'Cancel' buttons.

- After selecting the file, click **Upload** to save it.
- Click **Next** to move to the next tab.
- On the **Entity Set** tab, select the entity set from the drop-down.
- Click **Import** to finish. A progress message is displayed while the entities are transferred. It may take a few minutes to transfer changes depending on the size and number of entities in the set.

Note: See [Entity Set Sync](#) for additional instructions on importing **carrierKB** files.

Enable Communication with Rescue

To enable Agiloft communication with LogMeIn, log in to your Agiloft Knowledgebase as an admin user.

- Go to **Setup > Integration > LogMeIn Rescue**.

The screenshot shows the 'Setup -> LogMeIn Rescue' configuration page. At the top, there are 'Finish' and 'Cancel' buttons. The page contains two main sections for configuration. The first section is for 'Company ID', with the text 'Your company ID can be found in the LogMeIn Rescue Admin Center > Global Settings > Single sign-on' and a link 'If you don't have LogMeIn Rescue subscription, click here'. Below this is a text input field. The second section is for 'Single sign-on password', with the text 'Your single sign-on password defined in the LogMeIn Rescue Admin Center > Global Settings > Single sign-on' and a text input field. At the bottom right, there is a dropdown menu labeled 'Support Cases'. At the very bottom, there are 'Finish' and 'Cancel' buttons.

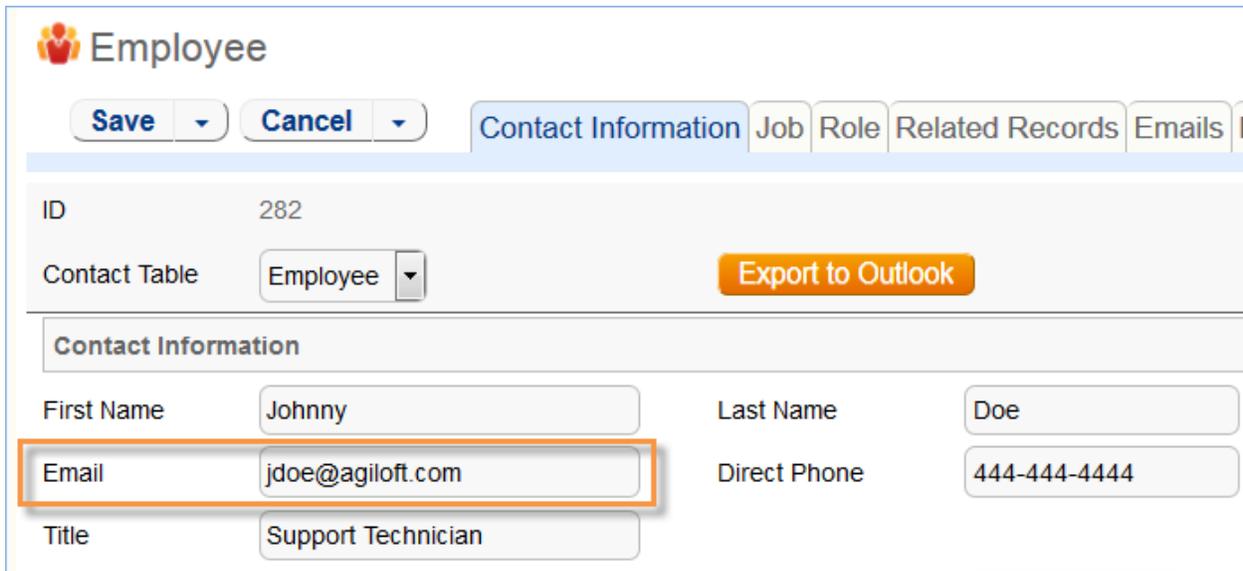
2. Enter the [Company ID](#).
3. Enter the [Single sign-on password](#).
4. From the drop-down, choose the [Support Cases](#) table.

Note: While it is possible to set up LogMeIn Rescue integration with other tables, the carrier KB is designed for the Support Cases table. Therefore, all structures, fields, etc., must be configured manually to integrate with other tables.

User Setup

To allow support technicians to launch sessions from an Agiloft record and accept those sessions in the LogMeIn interface:

- The user's [Single Sign-On ID](#) in the LogMeIn Rescue console must match the [Email Address](#) in the Agiloft user (People/Employee) record.



The screenshot shows the 'Employee' record form in Agiloft. The form is titled 'Employee' and has a 'Save' button and a 'Cancel' button. The 'Contact Information' tab is selected, showing fields for ID (282), Contact Table (Employee), and an 'Export to Outlook' button. The 'Contact Information' section includes fields for First Name (Johnny), Last Name (Doe), Email (jdoe@agiloft.com), Direct Phone (444-444-4444), and Title (Support Technician). The Email field is highlighted with an orange border.

Employee	
ID	282
Contact Table	Employee
Export to Outlook	
Contact Information	
First Name	Johnny
Last Name	Doe
Email	jdoe@agiloft.com
Direct Phone	444-444-4444
Title	Support Technician

Organization Computers Channels Sessions Reports Settings Global Settings Resources Calling Card

Technician Configuration

Ben T

Hide help

This is where you edit a Technician's configuration and view a Technician's permissions.

Technician permissions are set at the Technician Group level.

Use the Organization Tree to assign a Technician to a Technician Group by dragging the Technician to the target group.

Move to Technician Group:

Name: John Doe

Nickname: Johnny

Email: jdoe@agiloft.com

Single Sign-On ID: jdoe@agiloft.com

Description:

New password:

Confirm new password:

Additional Customization

Importing the [carrier KB](#) will automatically set up the necessary action buttons, as well as creating an embedded search result in Support Case records showing all related LogMeIn sessions.

Customize the Embedded Search Result filter

You may want to show all LogMeIn sessions for the current customer in the *embedded search result*. To change the default filter, first add a [Customer Name](#) field to the LogmeIn Rescue Sessions table. This field should be of the type [Link to selected fields from another table](#) and be linked to the [Customer Name](#) field in the Support Case table; you can add any other fields you think would be useful to the linked set.

1. From the **Fields** tab of the table wizard, edit the [LogmeIn Rescue Sessions](#) field.
2. On the **Permissions** tab of the field wizard, edit the saved search filter or create a new one.
3. Create a filter that finds records where the [Customer Name](#) in the LogmeIn Rescue Sessions table matches the [Customer Name](#) in the support case record. (The default filter pulls in all LogMeIn session records for this Support Case.)

Add Filters:

Simple Time Calendar Advanced Related Table Run-Time Duplicate First/Last

Customer Name equals = Variable \$case.end_user_name now

Next Finish Cancel

Customize the Layout

By default, the **Generate Pin** action button and the **embedded table** are on the **Related Records** tab of a support case. You can adjust the layout as needed from the layout editor.

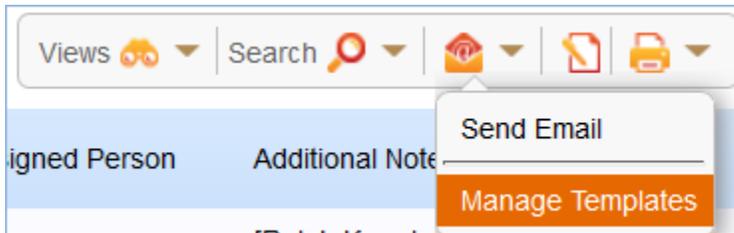
Customize Permissions

By default, only the Admin group has permission to view the tables and fields added by the **carrier KB**. If the **Generate Pin** action button and **Logmein Rescue Sessions** field don't appear automatically, check the permissions for your support technician group. To do this, go to **Setup Support Cases > Fields** and edit the relevant fields. Navigate to the **Permissions** tab and add the technicians' group under **Allow group to view the field in others' Support Cases**.

Customize the Email Template

An email template to send the PIN to the customer is added to the Support Cases table. By default, this email template is configured to send from 'example@example.com.'

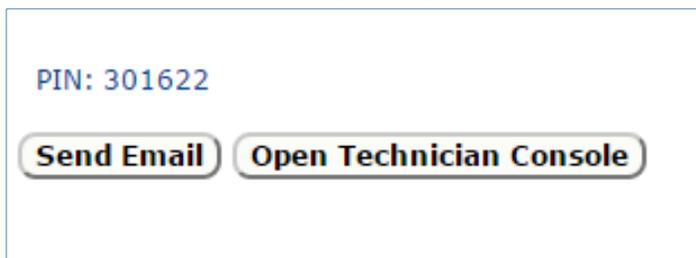
To change the 'From' line, edit the template: From the Support Cases **table view**, mouse over the Email icon and select **Manage Templates**.



Initiating a LogMeIn Support Session

To initiate a LogMeIn session, the support technician must first log into both an Agiloft KB and the LogMeIn Rescue Technician Console. To open a new session, for example, when a customer calls in, the technician will complete the following steps:

1. Open the Agiloft support case.
2. Click the **Generate PIN** action button (by default on the **Related Records** tab).
3. A pop-up appears containing the LogMeIn PIN:

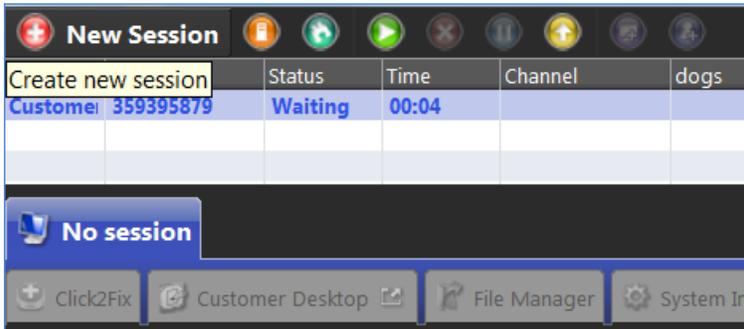


Click **Open Technician Console** to log in to LogMeIn Rescue (or open directly if necessary). Note that if the **Open Technician Console** action button in Agiloft does not work, you can open LogMeIn directly. LogMeIn will still post the session details to Agiloft.

4. Click **Send Email** to email the pin to the customer.

Note: By default, this email template is configured to send from 'example@example.com.' To change the 'From' line, edit the template by selecting **Manage Templates** in the Support Case **table view**.

5. Or, if the customer is on the phone, simply read the pin aloud.
6. Instruct the customer to enter the pin at www.logmein123.com
7. Accept the session within the LogMeIn interface by clicking the green Play button.



Session details are sent to Agiloft when the technician ends the session. A LogMeIn Rescue Session record will automatically appear in the embedded table of the linked support case record.