SCOPED CERTIFIED APPLICATION INSTALLATION AND CONFIGURATION GUIDE

TeamViewer Enterprise Integration for ServiceNow

Version 3.1.0

Table of Contents

Overview

The Application Installation and Configuration Guide will be used to assist with the preparation of the customer's instance in order to enable the application components to function properly. This document contains a clear, step-by-step process for any configuration steps that are required after installing the certified application from the ServiceNow Store. Additionally, it clearly calls out any application dependencies that exist.

Application Dependencies

- List all plugins required: -
    - Service Portal – Core [com.glide.service-portal.esm]. For information on how to activate plugins please visit https://docs.servicenow.com/bundle/vancouver-platform-administration/page/administer/plugins/task/t_ActivateAPlugin.html
    - OAuth 2.0 [com.snc.platform.security.oauth].
- List all system table permissions required: -

Configuration Instructions

When configuring the TeamViewer application, please take into account the points below:

- Configure Application Registry, TeamViewer Enterprise OAuth, in the System OAuth -> Application Registry
- Set the Admin token provided by TeamViewer in the Administration -> Properties module
- Set which TeamViewer Invite Options are available to supporters to create. One of the following options can be set:
    - Both Remote and Assist AR
    - Remote Only
    - Assist AR Only
- Choose whether to load MDv2 or MCO devices from TeamViewer in Administration -> Properties module.
- Register MCO Unattended Devices
    - Within the Administration -> Properties module, you must first set what table field within the Configuration Item [cmdb_ci] table will be used to match an MCO Device's alias that was registered via Account Assignment in TeamViewer. Please refer this list of description of possible table fields that can be used to match alias with: https://docs.servicenow.com/bundle/vancouver-servicenow-platform/page/product/configuration-management/reference/cmdb-table-property-descriptions.html
    - For each Device to be registered as a MCO Device, you must:
        - If loading devices from MCO, make sure each device has TeamViewer Application installed and has been assigned, through Account Assignment configuration, to the TeamViewer Account associated to the Admin Token used in the properties.

        - If loading devices from MDv2, make sure each device has TeamViewer Application installed and is part of a managed group in TeamViewer, and that the assigned group and its devices are manageable by the TeamViewer Account associated to the Admin Token used in properties.
        - There must be a Configuration Item record already created for each MCO Device to be registered with a field that matches with the alias of the MCO Device
    - After the above points is configured and verified, go to the module *Administration -> Unattended Devices* and you will see the UI Action Button called "Import Devices from TeamViewer". Click on that button and the application will import MCO Devices from TeamViewer that matches its alias with a Configuration Item, and will be marked as a registered MCO Device type.

- Configure Configuration item[cmdb_ci] field on the Task table (or any task field whose reference is child of or is the cmdb_ci table): update its Attributes field to include **x_tvgh_enterprise_initiate_unattended_session attribute** in order for the Initiate Unattended Session Button can be used; see Section 1.3.3 for details
- Update the Application Registry [oauth_entity] record: TeamViewer Enterprise OAuth
    - In the record, update the field Redirect *URL* by replacing <instance> with the name of the instance that the application is installed on and update the record.
- Configure if services cases should only show ones within ServiceNow, or all accessible in TeamViewer to the user
- Choose service cases opened by Supporters open in TeamViewer client or TeamViewer WebApp within Administration -> Properties module
- Choose if creation or cancellation of service cases are logged to Activities, done via Administration -> Properties module

External Systems Connection

TeamViewer application integration components:

- Integration components required:
    - TeamViewer WebAPI : https://webapi.teamviewer.com/api/v1
    - TeamViewer REACH API (**DEPRECATED)** :https://community.teamviewer.com/t5/Knowledge-Base/Remote-Access-API-Integration-Guide/ta-p/32318
- Steps to create a dedicated integration user:
    1. Go to https://login.teamviewer.com and click Sign Up to create a TeamViewer account that is needed to use the TeamViewer WebAPI. For the TeamViewer REACH API usage, the account created requires having a Tensor License.

Testing the configuration

There is no requirement to test the connection. If access to the TeamViewer Web API is not available, a relevant error message will be shown by the ServiceNow platform.

Demo Data

If any demo data is required as a part of your application installation, please outline the requirements here: -

Support and Troubleshooting

For any issues or questions on how to use the TeamViewer integration on ServiceNow, please use:

- Visit https://www.teamviewer.com/servicenow-community which contains instructions on how to set up and use TeamViewer Enterprise Integration.
- If you cannot find a response to your issue, please contact check out available resources at https://www.teamviewer.com/support or send an email to support@tvpartner-support.servicecamp.com

Administration and Configuration

1.1 Admin token

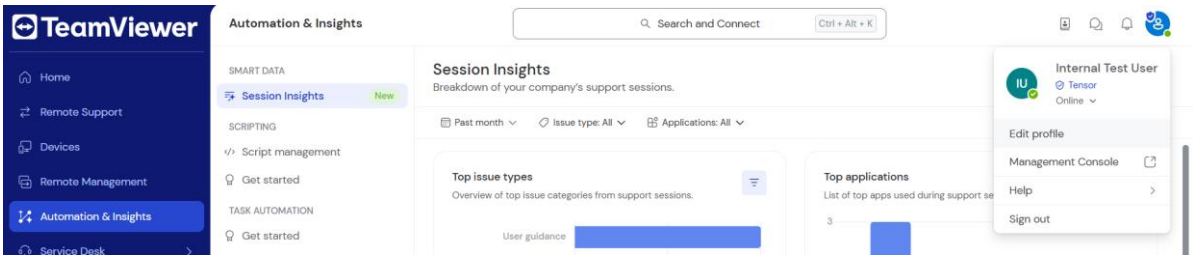
1.1.1 Introduction

To be able to access the TeamViewer API for certain features like scheduled company-wide connection reports, an admin TeamViewer Script token needs to be configured. Below are the steps on how to create one and configure your TeamViewer instance accordingly.

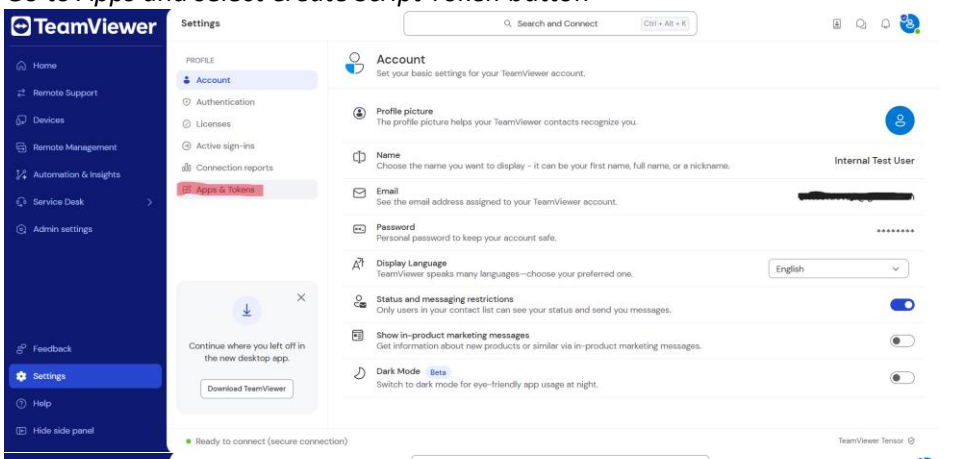
1.1.2 Creating an admin token

In this description, it is assumed that the administrator has created a company profile on TeamViewer. For more information on how to setup a company profile and add users visit https://community.teamviewer.com/t5/Knowledge-Base/How-to-add-Users-to-a-Company-Profile/ta-p/3573 .

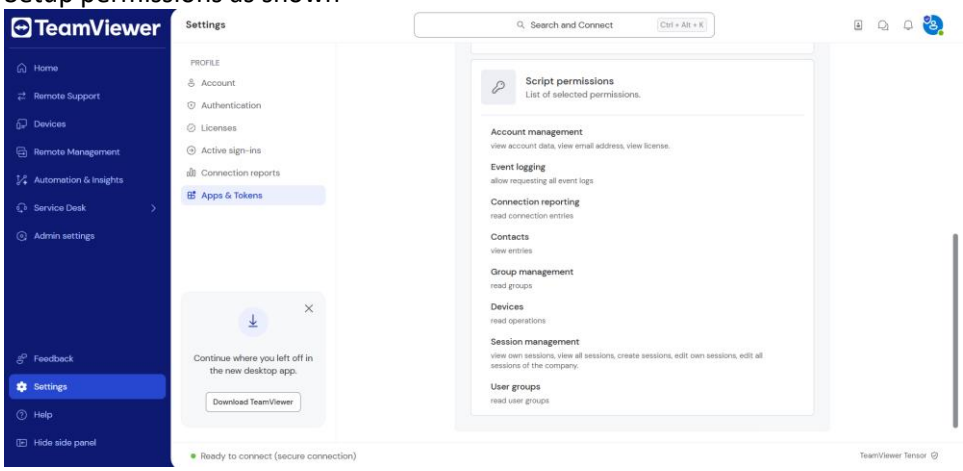
- Go to https://account.teamviewer.com and login with your TeamViewer account
- Go to ‘Profile’ on top right corner and select *Edit Profile*



- Go to *Apps* and select *Create Script Token* button



- Setup permissions as shown



  - Provide a meaningful name and description

- Click **save** to generate the Script Token

1.1.3 Enable Event Logs for Admin account

To download the event logs for a connection report,

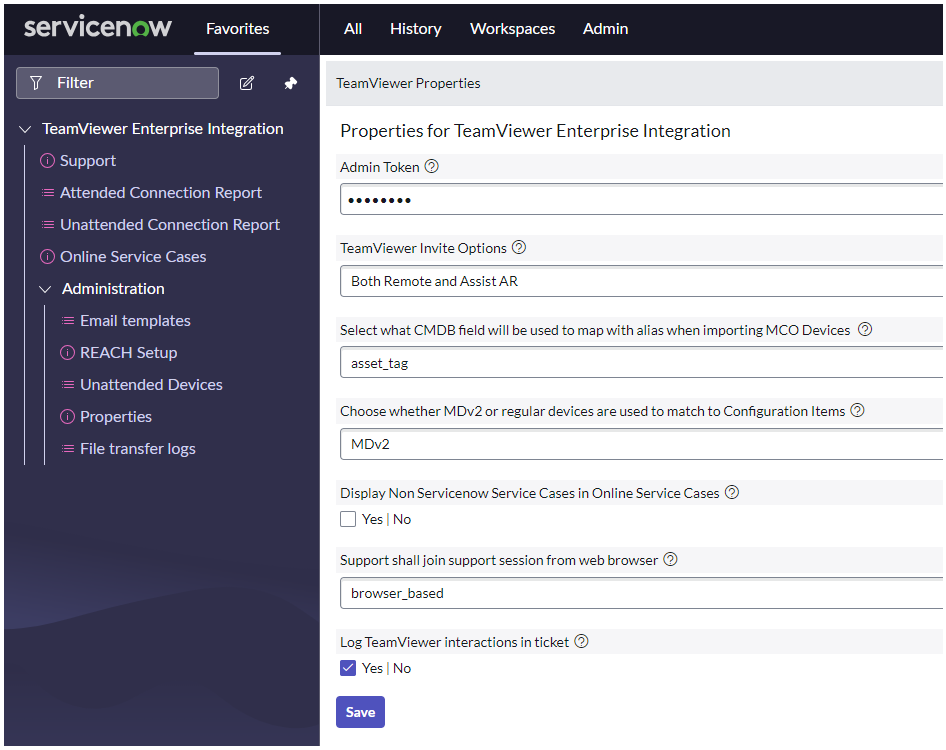
1. Go to https://login.teamviewer.com
2. Log in as another account which also has admin rights

3. Go to User Management, and edit the user whom you used for the Script Token in the above section.
4. Edit the Permissions to give then access to view Event Logs. Do this by going to Permissions, Setting the role to Customized Permissions, and change the option at the bottom called Event Logs to View.

1.1.4 Setting the Admin Token

Role required: admin

1. Connect to ServiceNow with the required user and role(s)
2. Go to module within the Application: Administration → Properties
3. Set the Admin Token for Attended Connection reporting and click Save as shown below:



1.2 TeamViewer Invite Options

1.2.1 Introduction

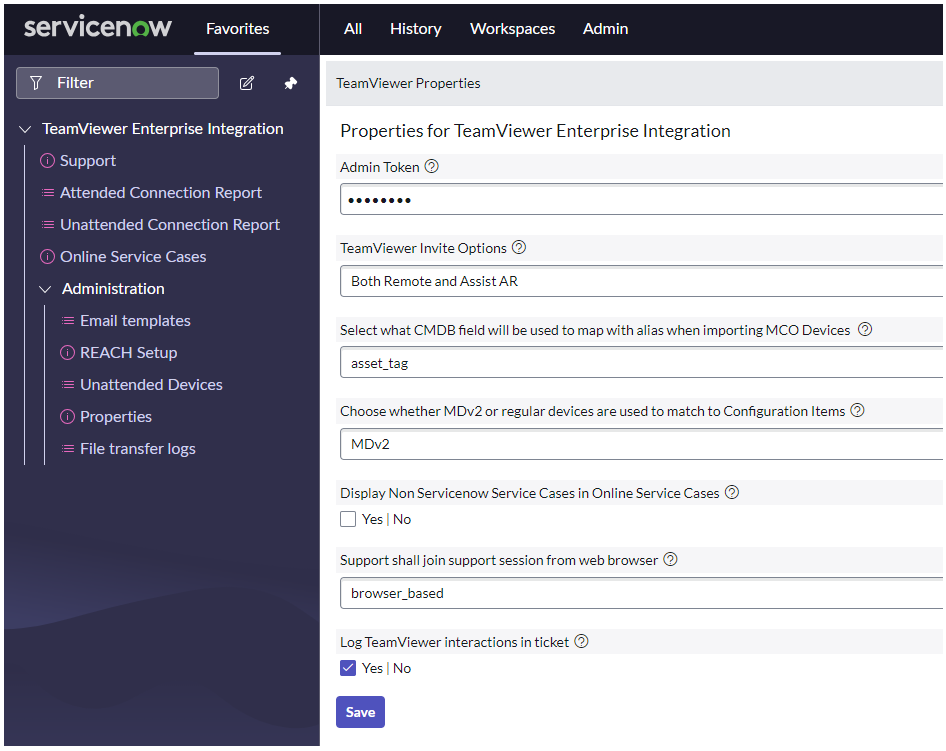
This chapter describes how to configure what types of TeamViewer invites are available to agents to create within ServiceNow. There are up to two invite types available for agents, which are the following:

- Remote Control Invite: This is the standard TeamViewer invite for Attended Session
- Assist AR Invite: This is a remote assistance solution powered by augmented reality that enables agents to connect to your support requesters and see what their smartphone camera live streams to your computer or mobile device while allowing you to draw, add text, or tag real-world objects with 3D markers for reference. **Please note**: this requires Pilot Subscription(s) for each agent that would like to use this invite option

1.2.2 TeamViewer Invite Options configuration

Role required: admin

1. Connect to ServiceNow with the required user and role(s)
2. Go to module within the Application: Administration → Properties
3. Set which TeamViewer Invite Options are available to agents as shown below:



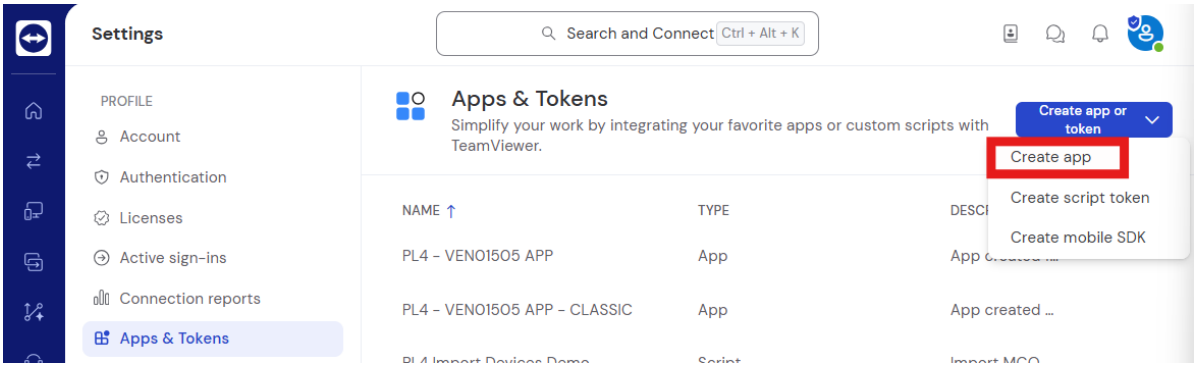
1.2.3 Application Registry for Oauth

1.2.3.1 Introduction

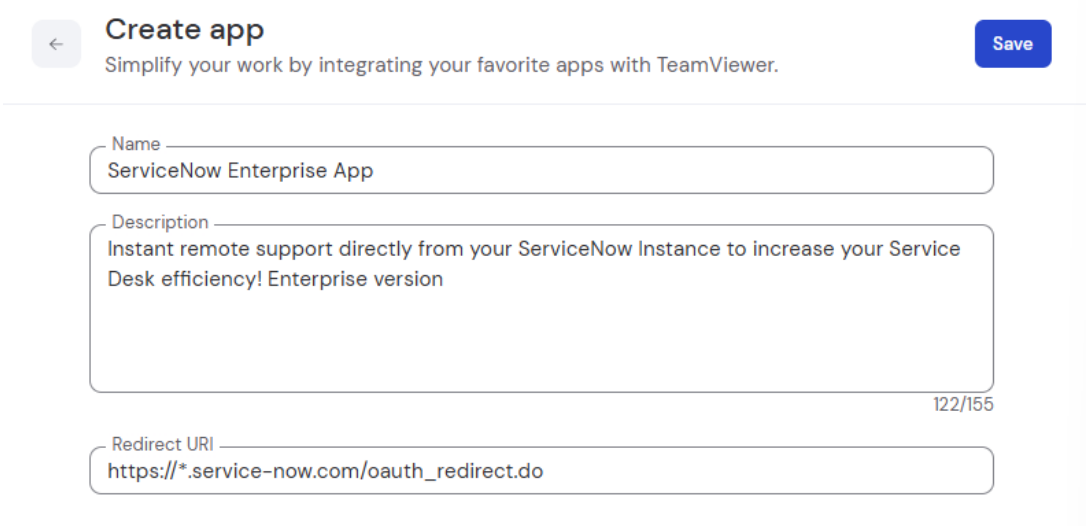
In this section, a step-by-step guide is provided to update the Application Registry [oauth_entity] provided by the application in order for the OAuth features can work when Supporters are creating and/or closing TeamViewer Service Cases in ServiceNow.

1.2.3.2 Create OAuth Client App in TeamViewer

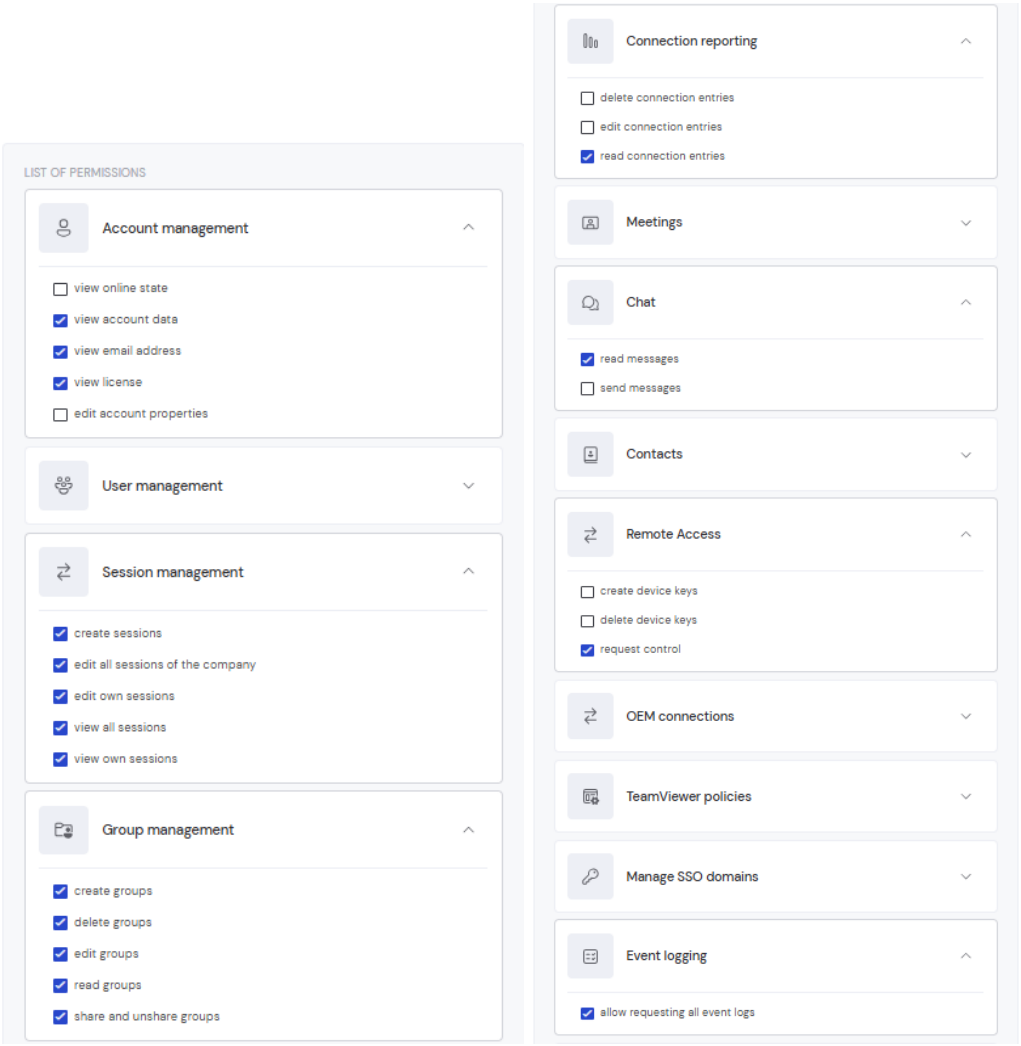
1. Login at account.teamviewer.com to create an app. Similar as to the script Admin token created in the previous section, you need to also create an Oauth client app below:



2. And create an app with the following permissions and click on save:

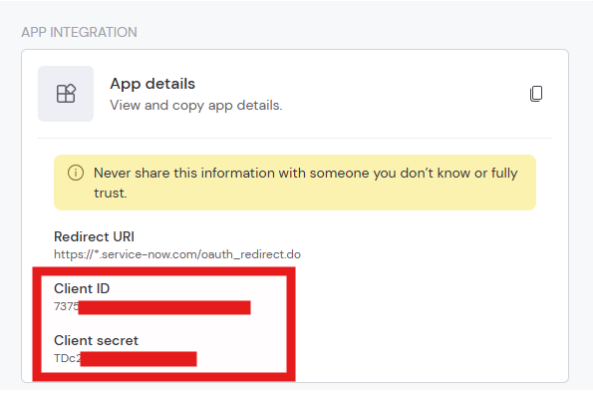


General app info



App permissions to add

3. Afterwards copy the Client ID and Client secret generated from the app to be used in ServiceNow in Section 1.2.3.3:

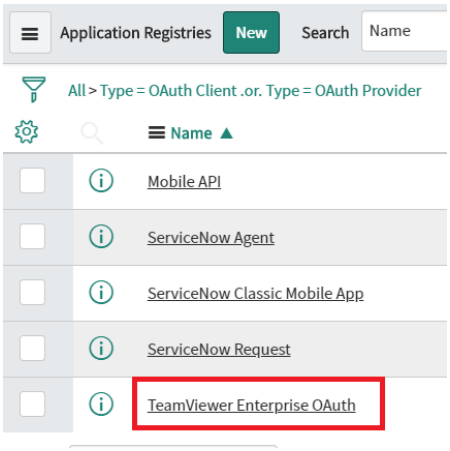


Client ID and Client secret to capture

1.2.3.3 Update TeamViewer Enterprise OAuth Application Registry

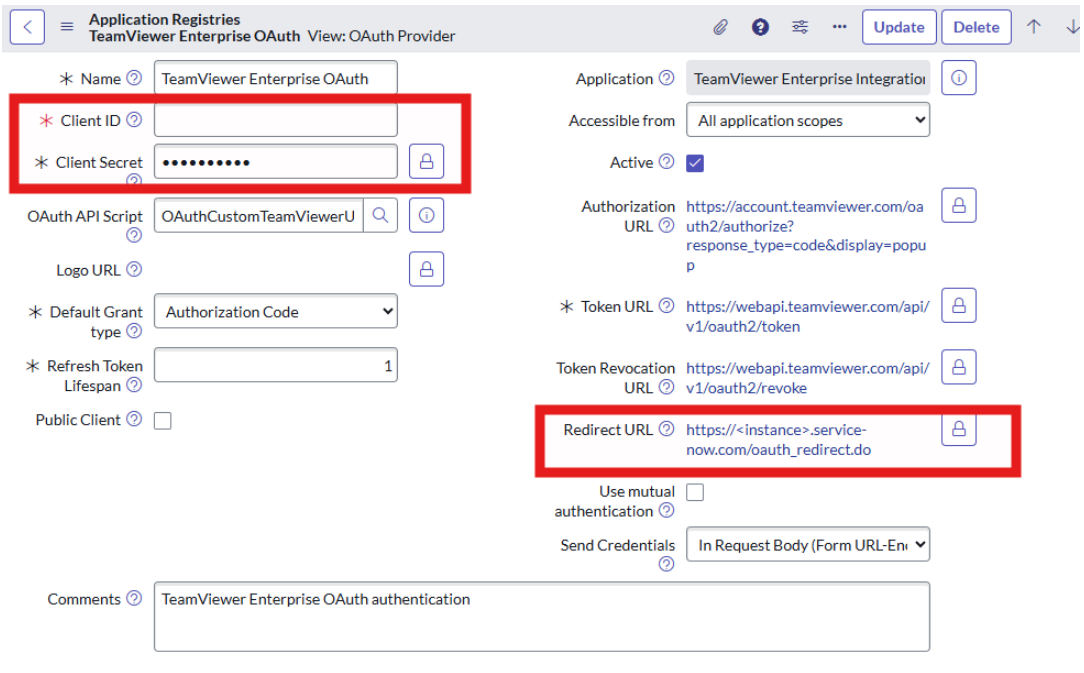
Role Required: admin

1. In ServiceNow, open module *System OAuth -> Application Registry* and open the record **TeamViewer Enterprise OAuth** as shown below:



Record to open

2. In the record, update the following fields and save:
   a. Client ID: Use the Client ID captured in Section 1.2.3.2
   b. Client Secret: Use the Client Secret captured in Section 1.2.3.2
   c. Redirect URL: Replace <instance> with the name of the instance that the application is installed



Fields highlighted to edit

1.3 Unattended Access Setup

1.3.1 Register MCO Unattended Devices

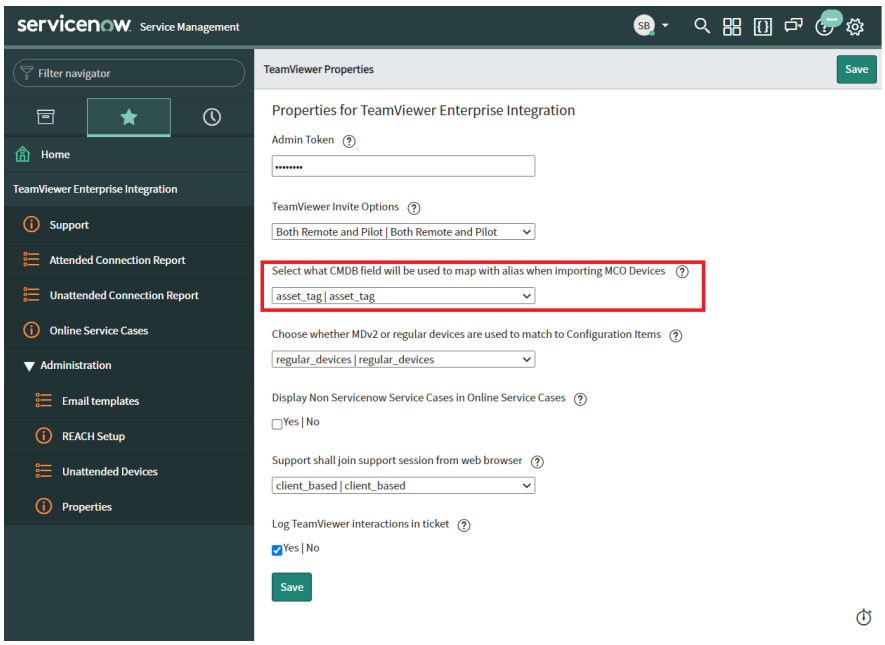
Pre-Requisites:

- For each MCO Device to be registered in ServiceNow, the device must be assigned to the TeamViewer account associated to the Admin Token set in Step 1.1.4.

Role Required: admin

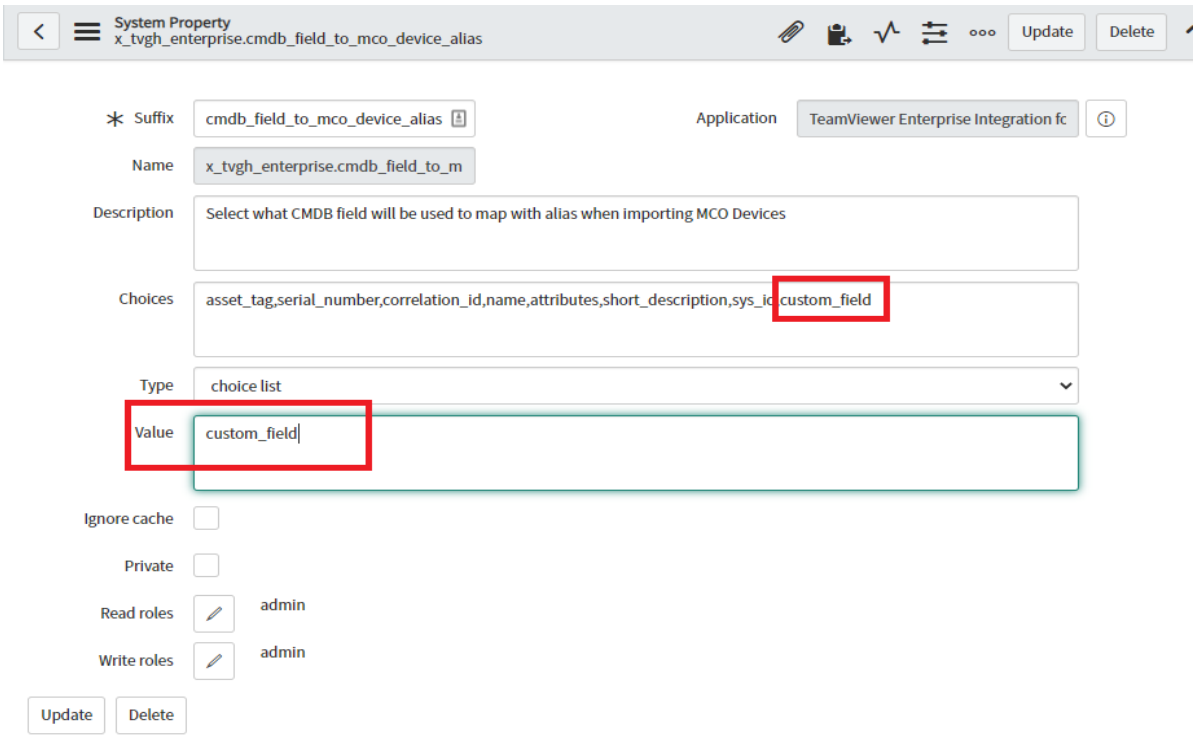
Here are step-by-step instructions on how to register a MCO device for Unattended Access. MCO Device records cannot be manually added. For manually added devices, refer to REACH Devices in section **Error! Reference source not found.**. The TeamViewer application can only import MCO devices from the TeamViewer server by matching a device's alias, in TeamViewer, with field value within a record in the Configuration Item [cmdb_ci] table in ServiceNow.

1. Configure what field in the Configuration Item table is to be used for matching a Device's alias in TeamViewer within the Administration -> Properties module. For this step guide we will use the Asset Tag [asset_tag] field, as an example, as shown here:

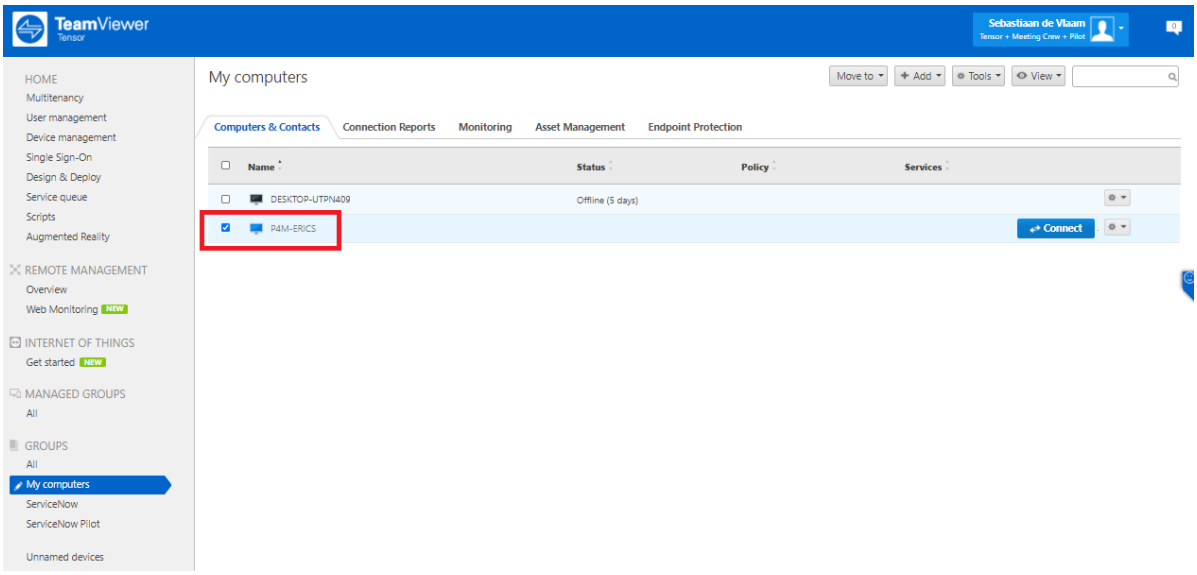


Advanced Note: The possible table fields options by default may not list a table field that you may need like a custom field. If that is the case, you may set the field manually by opening the System Property record directly, for property **x_tvgh_enterprise.cmdb_field_to_mco_device_alias**, and expand the choices and value with the field needed and save changes, for example:

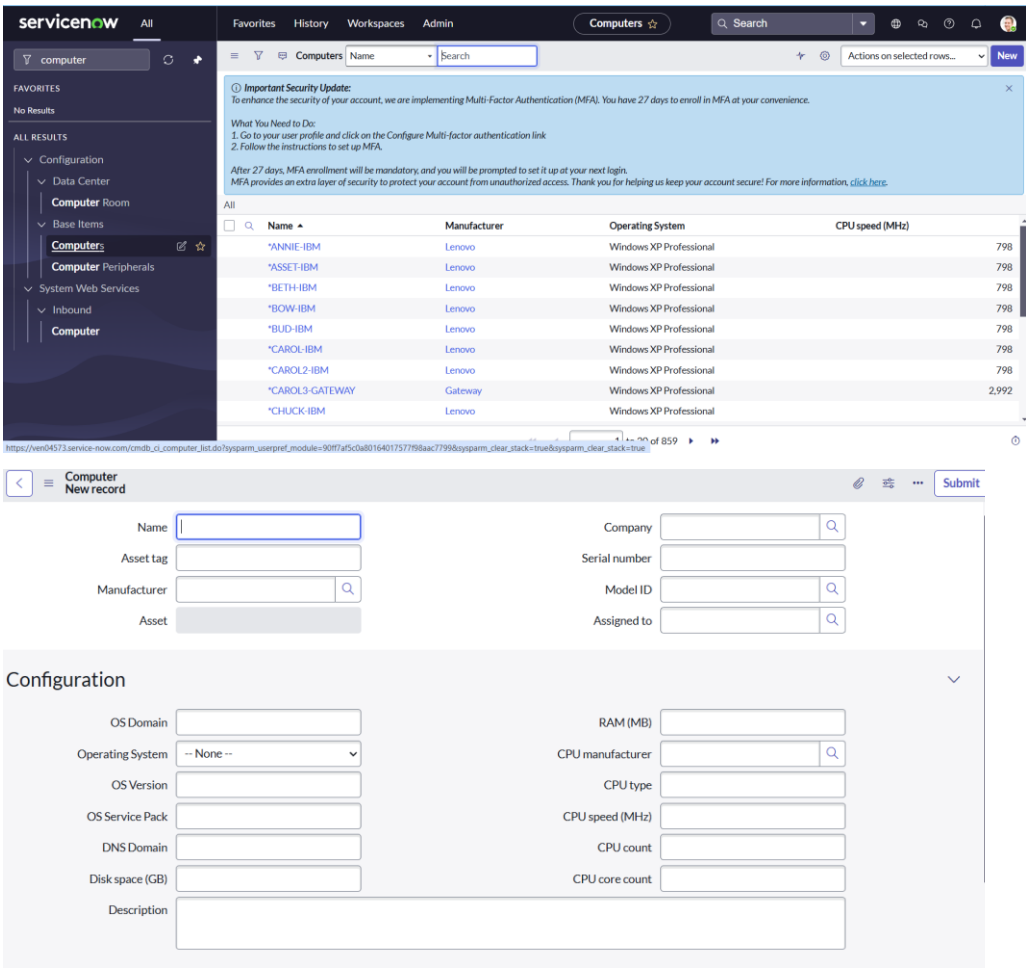
re



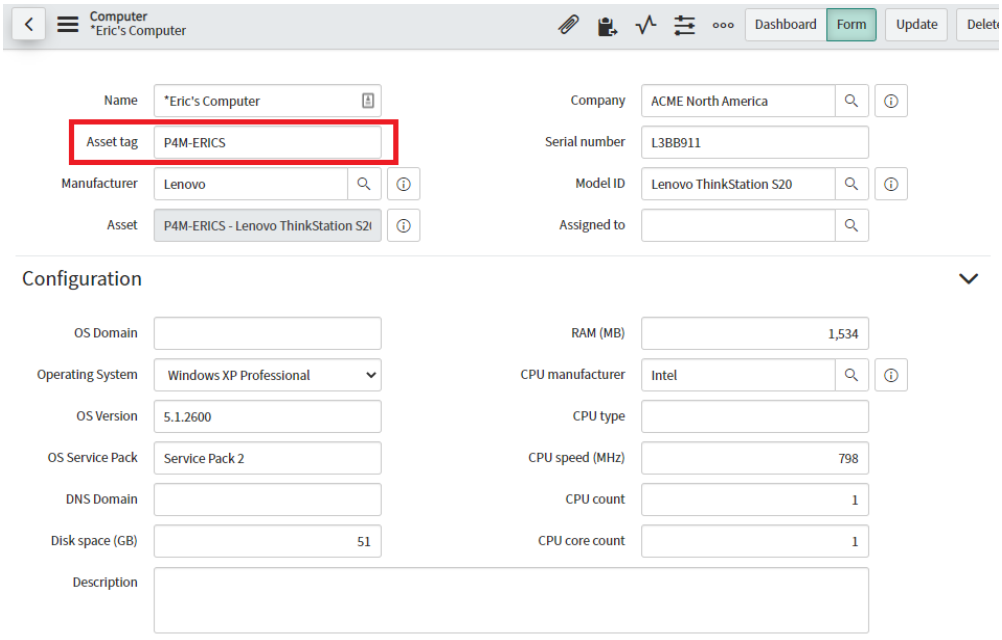
2. For each MCO Device to be registered, there must be a Configuration Item record, including record(s) in child tables, that matches the MCO Device alias with the field set in (1). For example, in TeamViewer, we have a MCO Device in TeamViewer with the alias “P4M-ERICS”:



To create Configuration Item, search for “Computers” and click “New”.

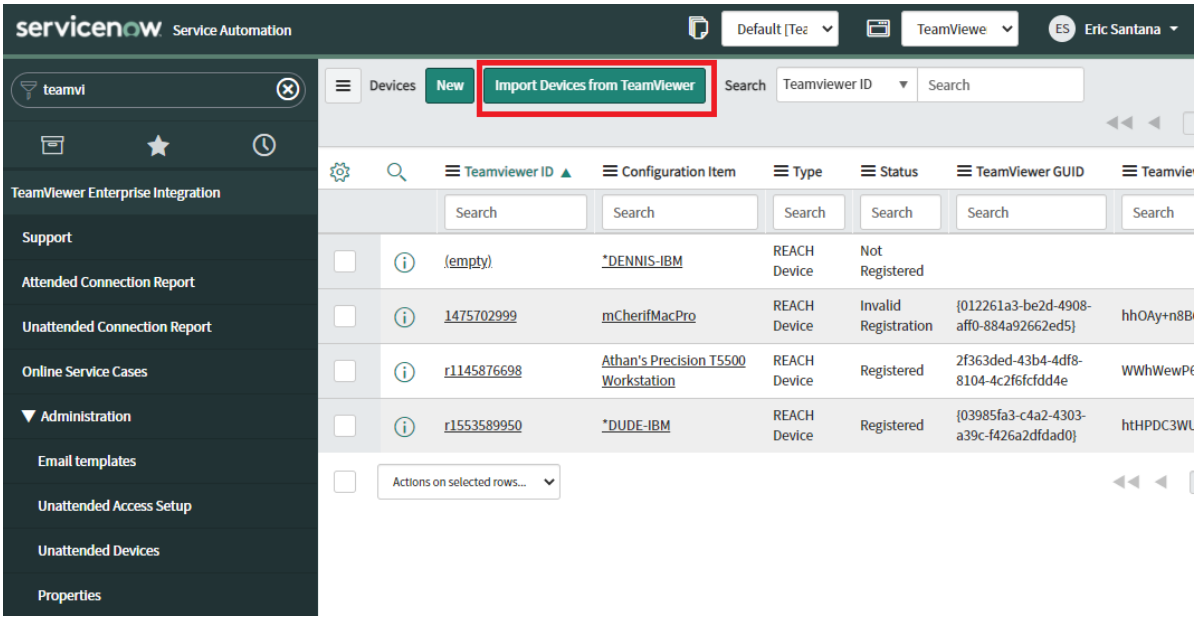


So, in ServiceNow we need to create a Configuration Item record that matches the alias in the Asset Tag field:

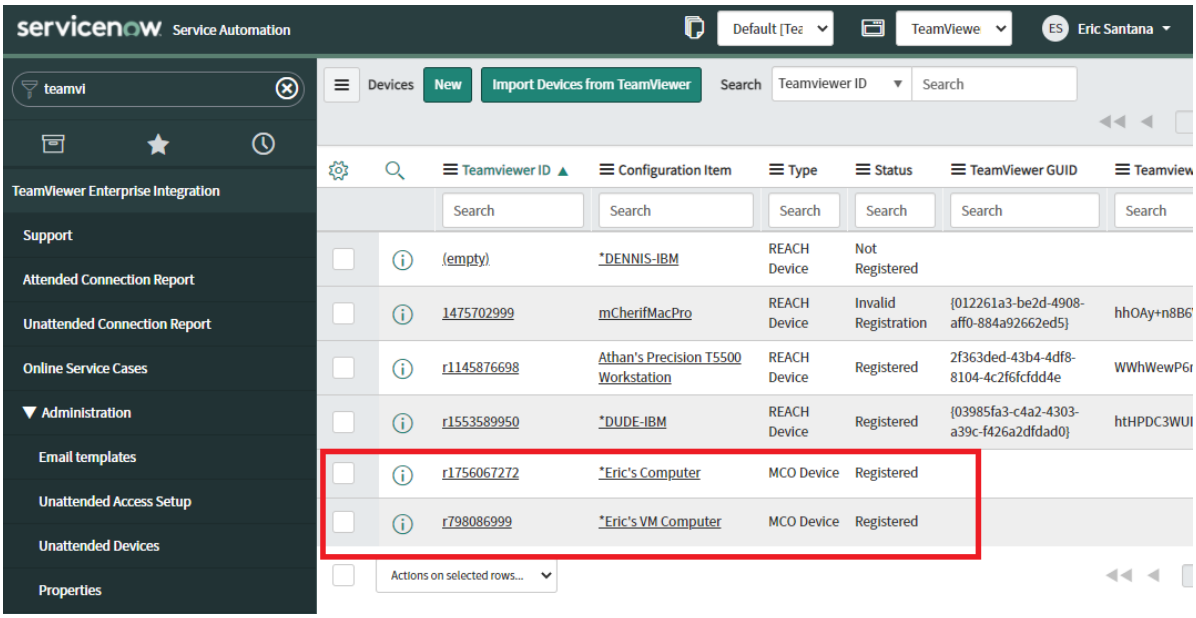


3. Repeat Step (2) as needed per device.

4. Go to the application module Administration -> Properties and click on the UI Action Button "Import Devices from TeamViewer" to import devices:

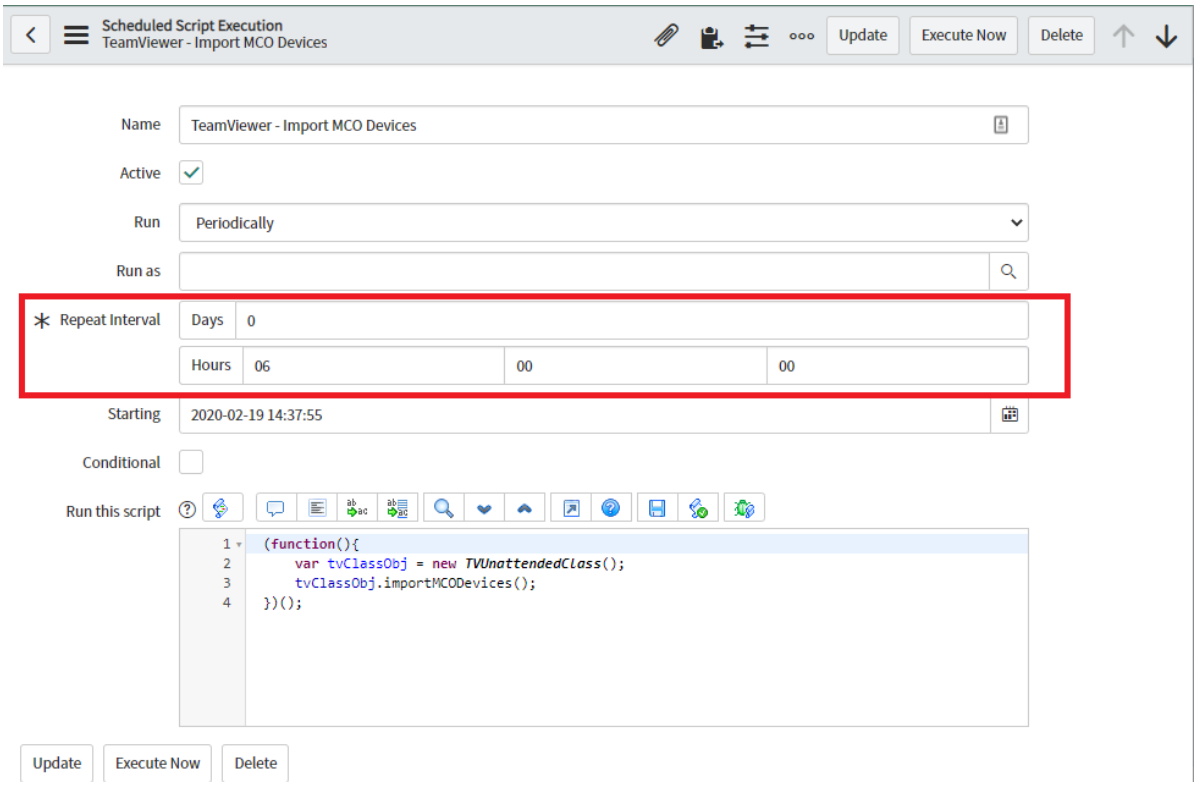


5. Verify MCO Device Imports by checking the Device records of type MCO Device. These devices are registered and can be used for unattended session. For example here some imported MCO Devices:



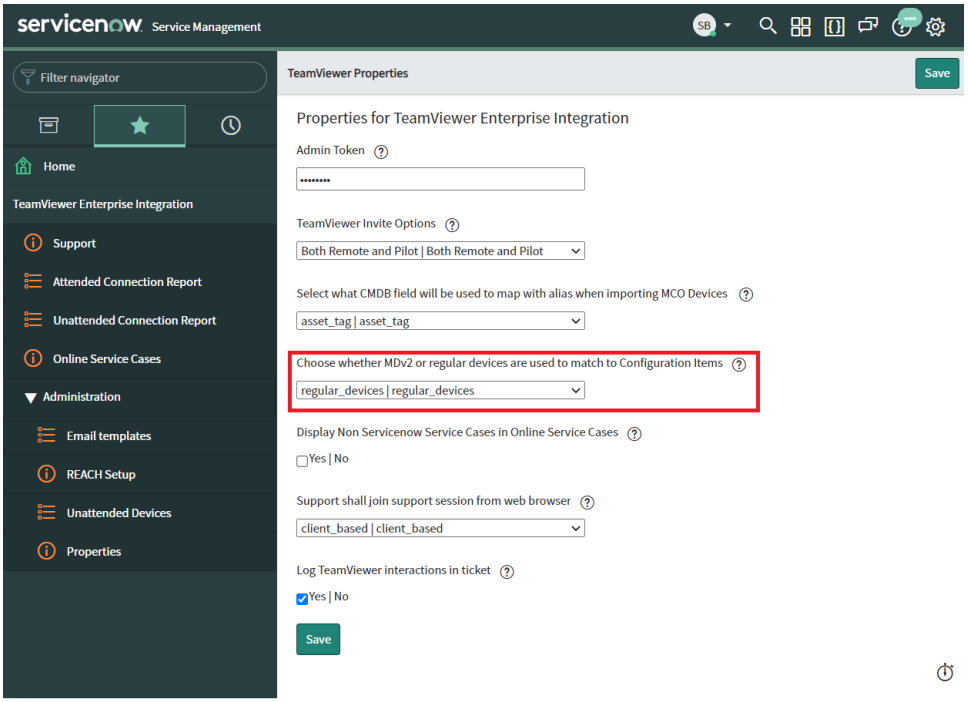
1.3.2 MCO Device Scheduled Import

As discussed in Section 1.3.1, MCO Device records cannot be manually created, but they are imported from the TeamViewer server by the application, as long as there is a Configuration Item that matches an alias of a device in TeamViewer. The application is configured by default to import MCO Devices every 6 hours through the Scheduled Job, found under ServiceNow module System Definition -> Scheduled Jobs, *TeamViewer - Import MCO Devices* as shown here:



You may adjust the frequency as needed. Please note that when this scheduled job runs, there could be a possibility of MCO Device records of being erased due to the MCO Device no longer existing in the TeamViewer Server, or MCO Devices no longer matching alias with a Configuration Item record.

To import your managed devices instead of all devices, select MDMv2 in the properties.

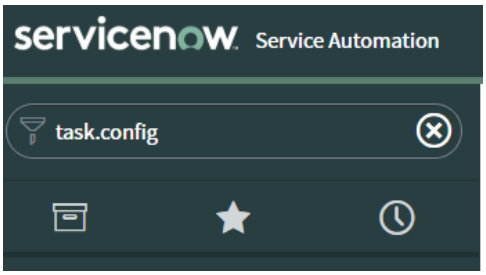


1.3.3 Adding the Initiate Unattended Session button to the Task Table (or task extended table)

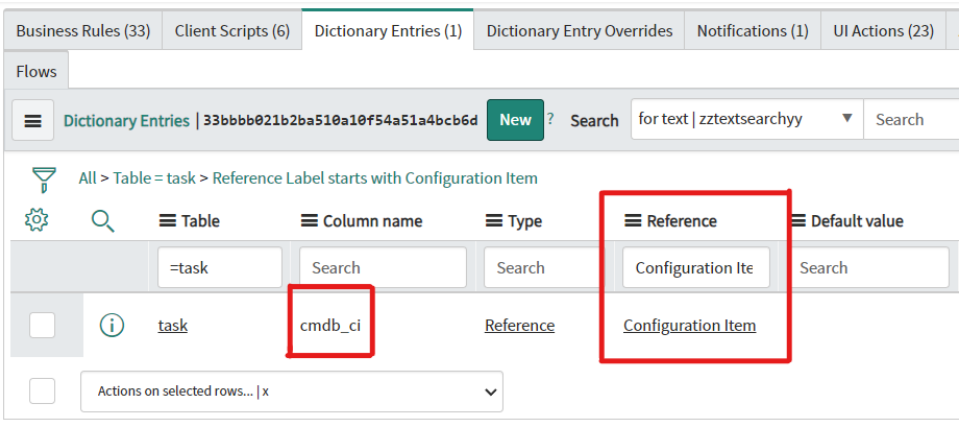
In order to be able to start an Unattended Session on a Registered Device, changes need to be made on the Task [task] table 9or task extended table) in order to show the button that allows you to initiate the session. This section provides instructions on setting this up.

Role Required: admin

1. On the Filter Navigator, type in (table_name).config (for example task.config) and press enter



2. Go to the Dictionary Entries tab for the Task table and open the record you want to show the button on. This must be a field with reference to “Configuration Item” table, for example in task the field **cmdb_ci**, or it must be a field from which you can dotwalk to a “Configuration Item” field.



3. Within the record opened in Step 2, look for the Attributes field. If the attributes field is not visible, click on the Related Link “Advanced”, and it should now be visible. Add **x_tvgh_enterprise_initiate_unattended_session** attribute as part of the Attributes field, and update the record:

Attributes

ref_auto_completer=AJAXTableCompleter,ref_contributions=task_show_ci_map;show_related_records:x_tvgh_enterprise_initiate_unattended_session,ref_ac_columns=sys_class_name,ref_ac_order_by=sys_class_name

3.1 If the field is not a “Configuration Item” field, but a field you must dot walk to the “Configuration Item”, then set another attribute called “tv_field_dot_walk” with the value of the dot walk path to the “Configuration Item” field. For example, on the Task table, the parent field has the field “cmdb_ci”, and it would be configured as below.

Attributes | `attributes`

encode_utf8=false,ref_contributions=x_tvgh_enterprise_initiate_unattended_session,tv_field_dot_walk=cmdb_ci

1.4 Adding TeamViewer to task extended table

1.4.1 Introduction

This chapter described the step-by-step guide on how to add the TeamViewer Control and TeamViewer Connection History to a form in ServiceNow. This can only be applied to records on tables that are an extension from the task table. The application comes preconfigured with the TeamViewer Control (for Supporters) and TeamViewer Connection History on the Incident form (default view).

Prerequisites

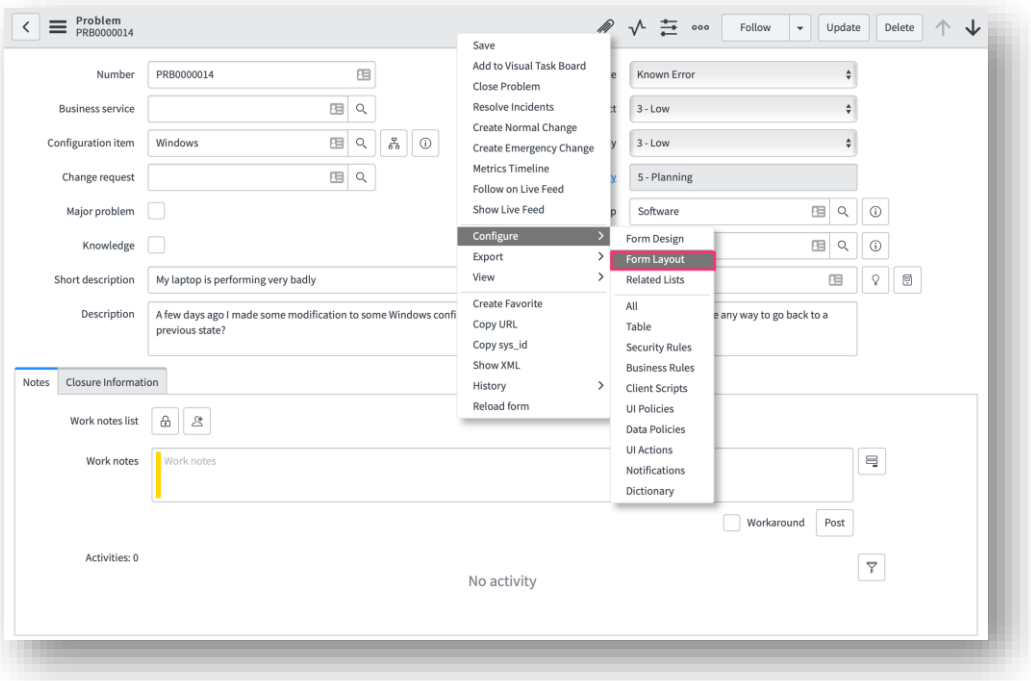
The following prerequisites need to be met to be able to follow the steps in this guide:

- ServiceNow Store Application: TeamViewer Enterprise Integration for ServiceNow is installed, version 1.0 or above
- Role: admin

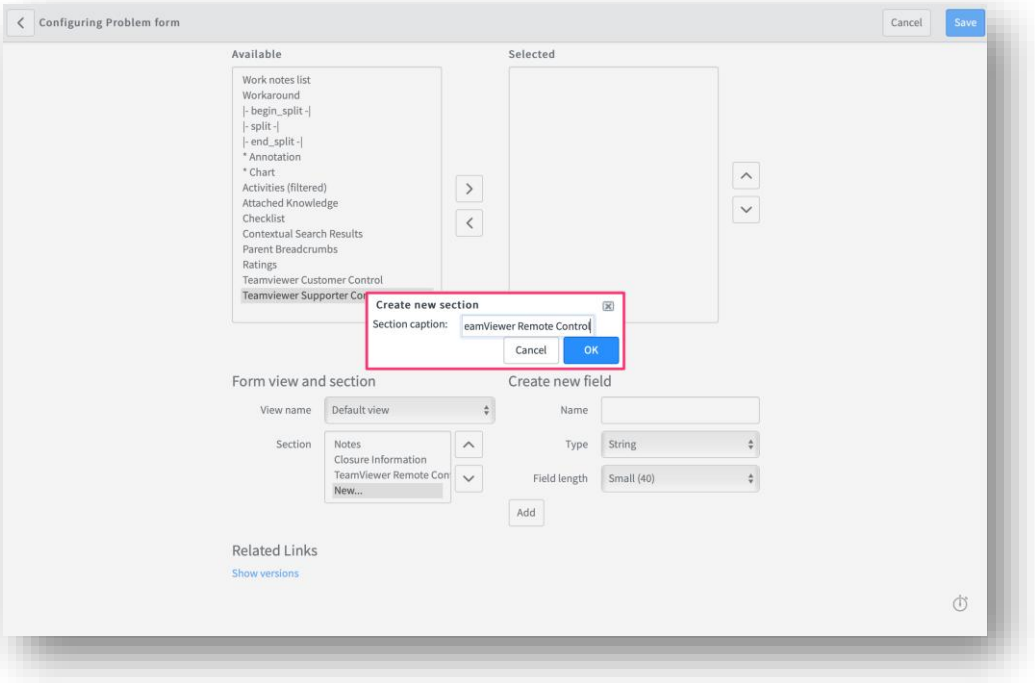
1.4.2 Adding the Remote-Control section, for Supporters, on a form

To add the TeamViewer Control to the form, follow the steps below. General documentation on how to add fields to a form can be found here:
https://developer.servicenow.com/dev.do#!/learn/learning-plans/vancouver/new_to_servicenow/app_store_learnv2_buildneedit_vancouver_form_designer

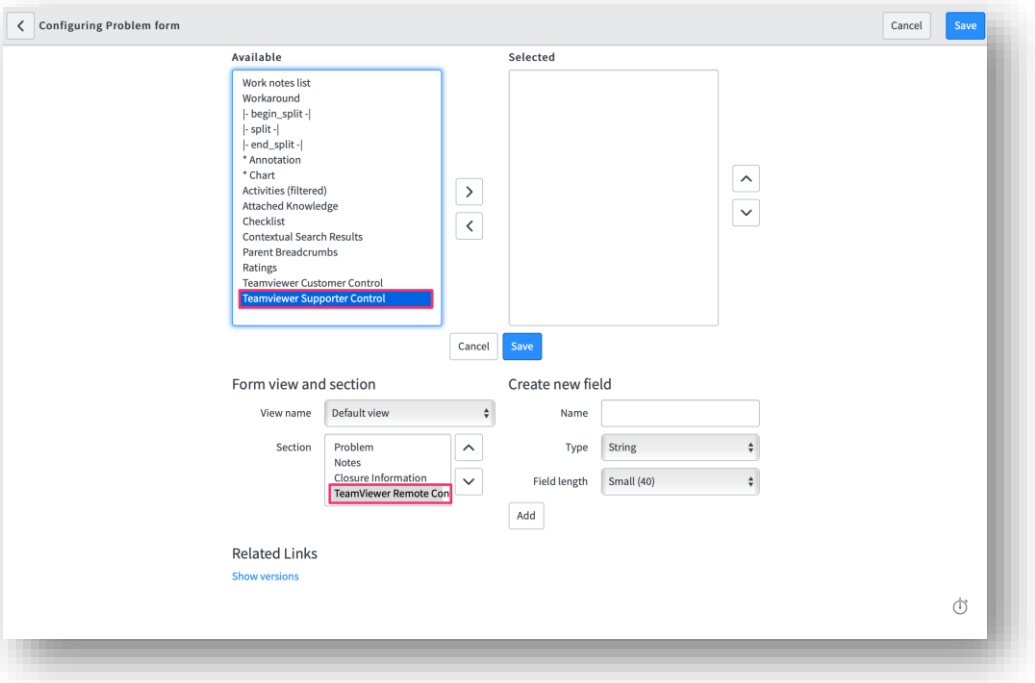
1. Open the form of the Task extended record type (e.g. problem, change request, requested item), where you want to add the TeamViewer Control
2. On the form right click on the form's header
3. From the menu choose *Configure -> Form Layout*



4. From the 'Section' field, click on '*New*' and a dialog for entering a name is shown. Enter a name (e.g. *TeamViewer Remote Control*) and click on OK. Documentation on how to create a form section can be found here: https://docs.servicenow.com/bundle/vancouver-platform-administration/page/administer/form-administration/concept/configure-form-layout.html#t_CreateAFormSection

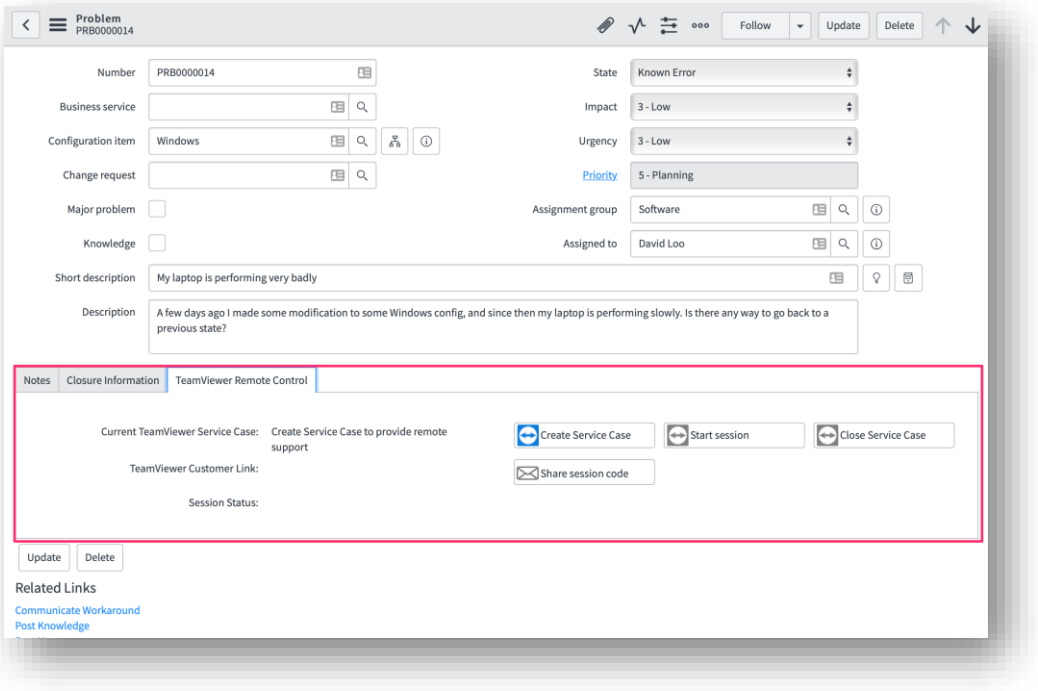


5. Add the *TeamViewer Supporter Control* to the newly created form section.



6. Click on *Save* to apply the changes to the form.

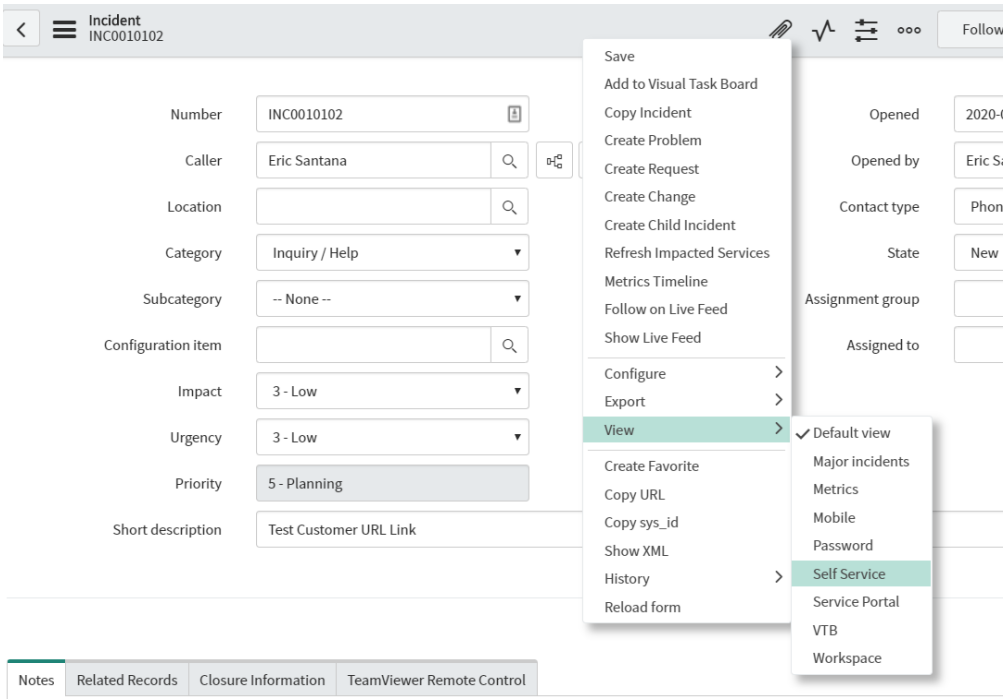
7. The TeamViewer Control should now be visible on the form within a form section.



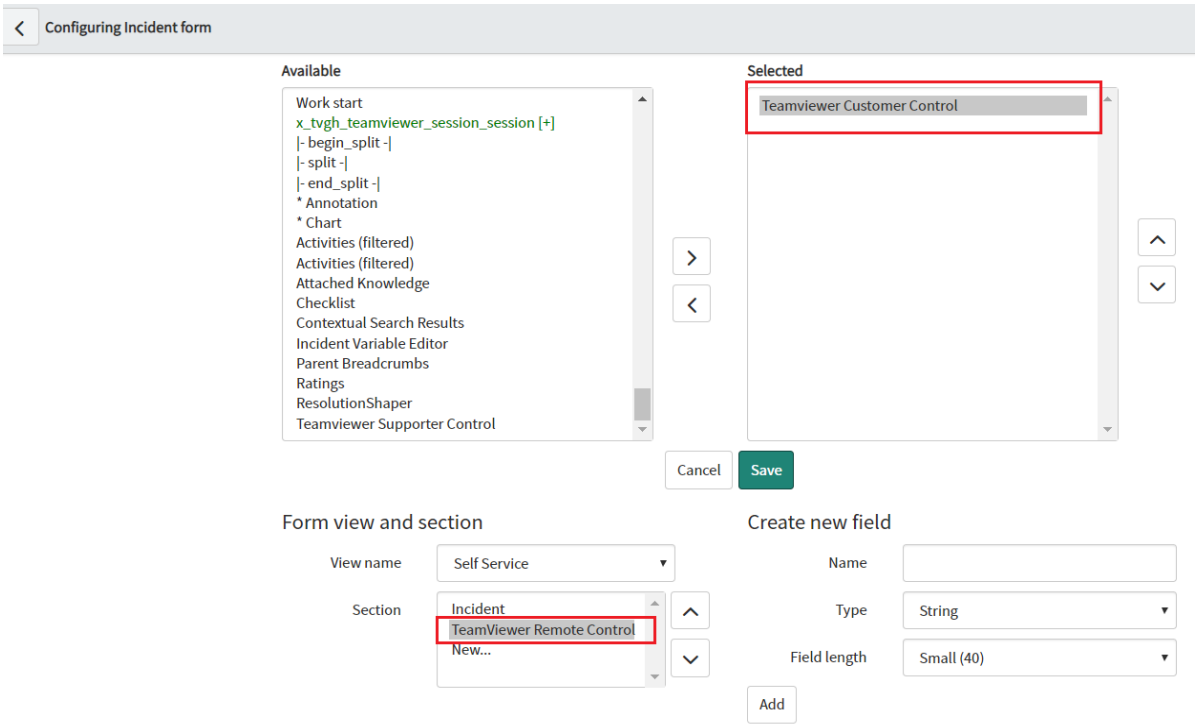
1.4.3 Adding the Remote-Control section, for Customers, on a form

To add the TeamViewer Control, for customers, to the form, repeat the steps and instructions in the previous section (8.4.2), but with the following deviations:

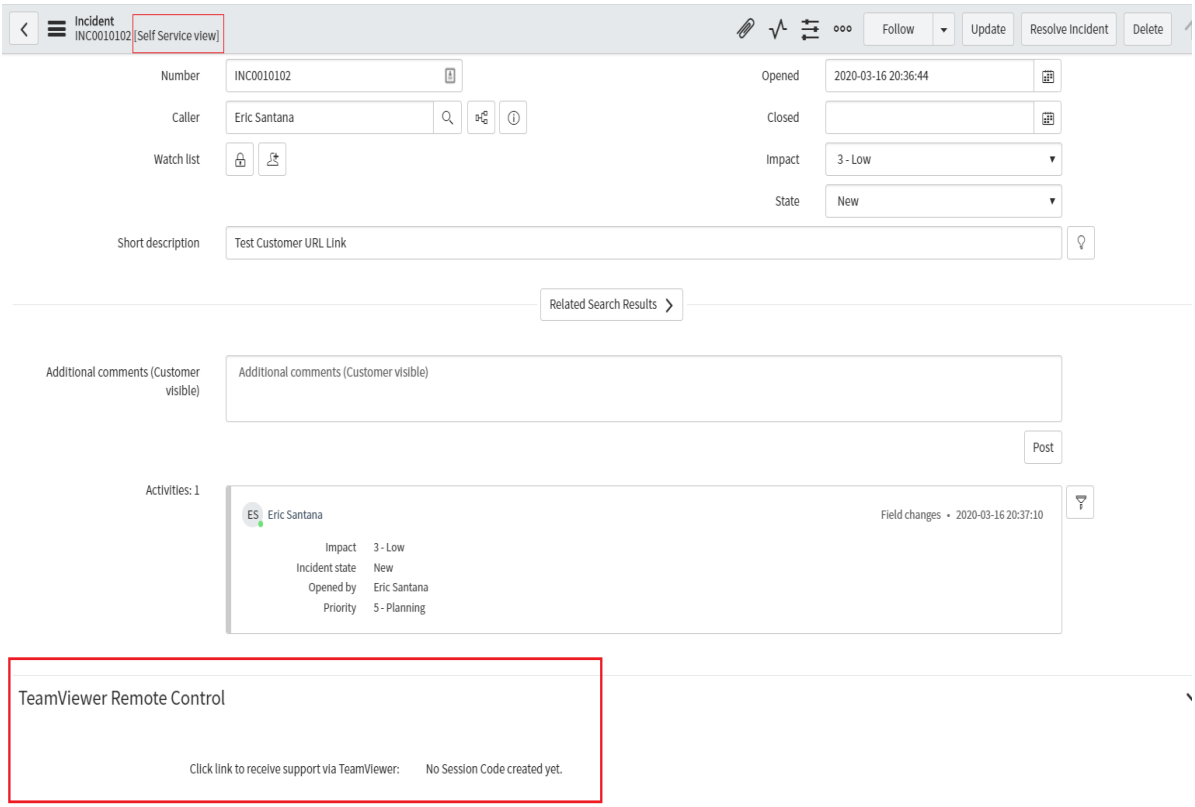
1. In the form, change the view to Self Service first as shown here:



2. Then, configure the Form Layout of this view by adding new section, called TeamViewer Remote Control and add TeamViewer Customer Control. Afterwards, click Save, similar to 1.4.2. Before clicking Save, the configuration should look like this:



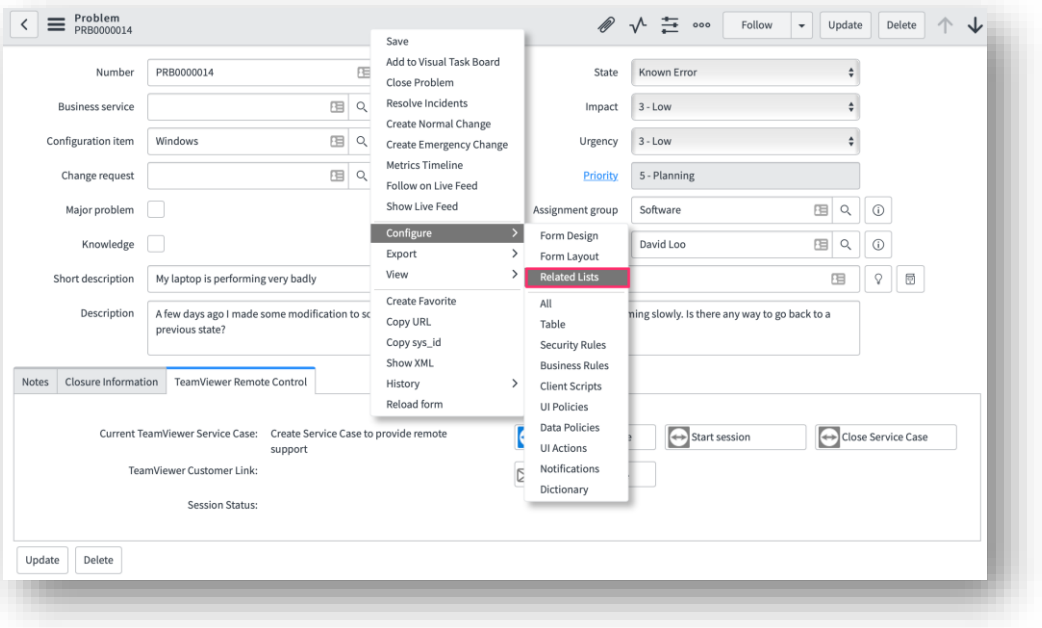
3. To confirm the changes in this section, go into an incident record in the Self-Service View and the TeamViewer Customer Control should be visible as shown here:



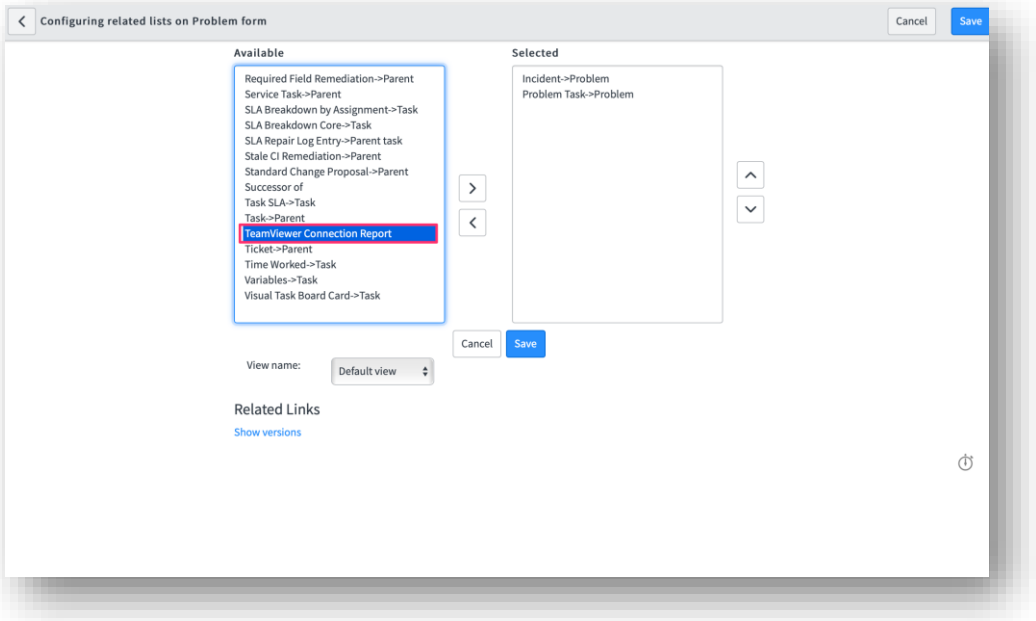
1.4.4 Adding the TeamViewer Connection Report to the Form

The next step is to add the TeamViewer Connection Report to the form, this related list shows the connection history for the open task record. More information on adding a related list to a form can be found here: https://docs.servicenow.com/bundle/vancouver-platform-administration/page/administer/form-administration/concept/configure-form-layout.html#t_AddARelatedList.

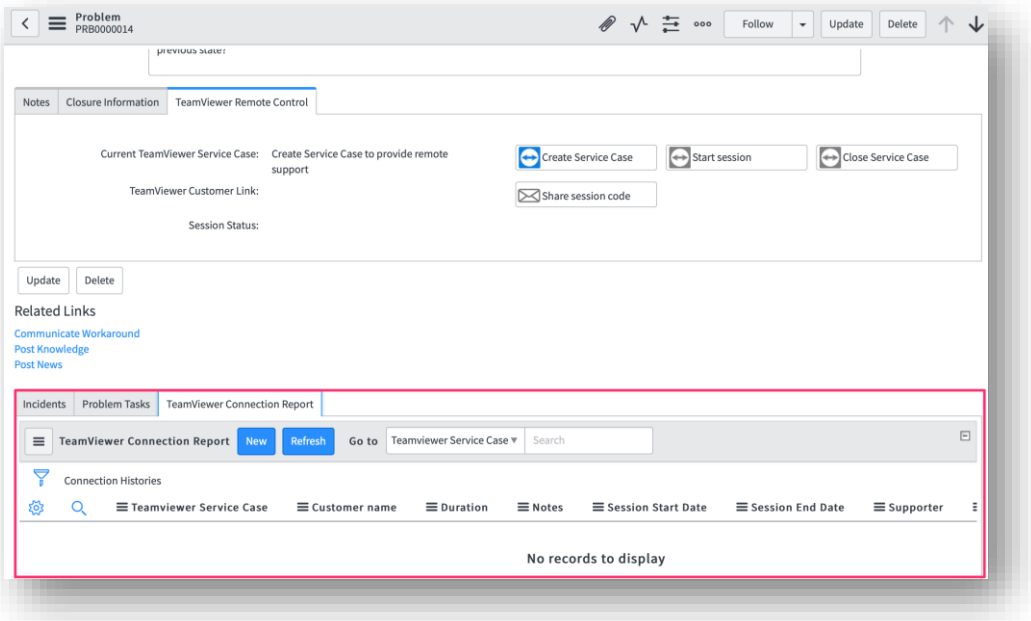
1. Open the form of the Task extended record type (e.g. problem, change request, requested item), where you want to add the TeamViewer Connection Report
2. Right click on the form's header a go to *Configure -> Related Lists*



3. From the *Available* list, select the *TeamViewer Connection Report* and add it to the *Selected* list by clicking the *Add* arrow.



4. Clicking on *Save* to apply the changes on the view.
5. The TeamViewer Connection Report is now be visible under the related lists at the bottom of the form.



1.5 Roles

The application permissions model is based the following roles:

Role	Permissions
admin	Standard ServiceNow admin role that has complete control of all configuration in the application. Also, this role has all the

	permissions of the other roles listed in this table
x_tvgh_enterprise.tv_user	This role allows the user to use the TeamViewer Application and see the TeamViewer connection history for task records assigned to them. Also, with this role, user can: • Create and close Remote Control Invites • Create and close Assist AR Invites • Can send SMS Assist AR Invite • Initiate Unattended Session • Open the Online Service Cases Module
x_tvgh_enterprise.session_history_user	Can view the TeamViewer Connection Report for the company wide connection history for both Attended and Unattended Connections
x_tvgh_enterprise.device_user	Can Enable and Disable Unattended Access in the Device [x_tvgh_enterprise_device] table

1.6 Connection History and Scheduled jobs

1.6.1 Introduction

The TeamViewer Enterprise Integration for ServiceNow application keeps a history of connections created from Sessions via ServiceNow for your account. This is stored in the Connection History table. The information in this table is periodically refreshed and augmented with the relevant information from the session, like the task reference, and its event logs.

1.6.2 Connection history refresh

The connection history is retrieved from TeamViewer via the API on four occasions:

1. When a session is closed, the connection history for that session I is retrieved
2. A scheduled job periodically (6 hours by default) retrieves the attended connection history
3. A scheduled job periodically (6 hours by default) retrieves the unattended connection history
4. A manual refresh of the connection history can be requested by a user with the proper role from the TeamViewer Connection Report table list view.

1.6.3 Setting the scheduled job period

There are two scheduled jobs, one for Attended Access and the other for Unattended Access, that periodically retrieves the connection history is by default set to run every 6 hours. This interval can

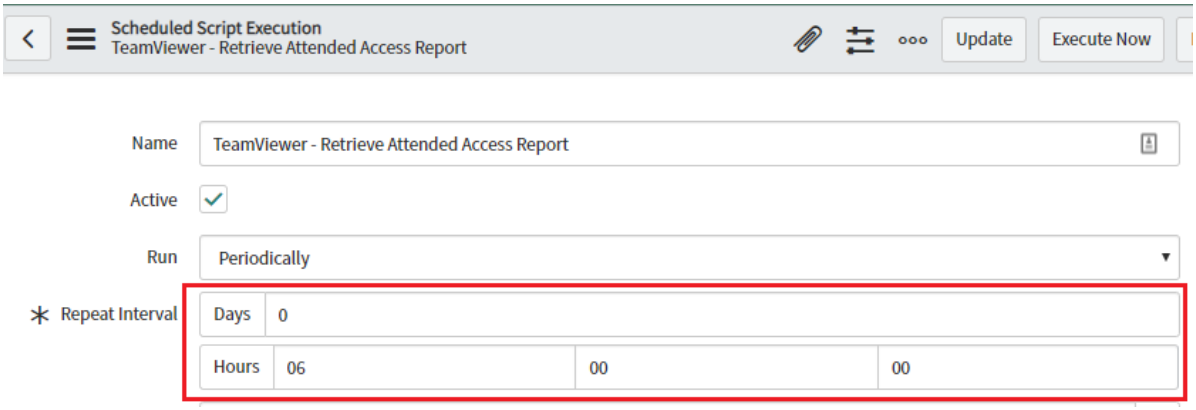
be updated by the ServiceNow System administrator by updating the repeat interval on the scheduled jobs.

Follow these steps to do this:

Role required: admin

1. Go to the *System Definition* > *Scheduled Jobs*
2. Open the record for each of these jobs:
    a. *TeamViewer - Retrieve Attended Access Report*
    b. *TeamViewer - Retrieve Unattended Access Report*
3. **Run each job once, via the *Execute Now* button, to make sure the latest connection history is retrieved, and no records are missed due to a changed period.**

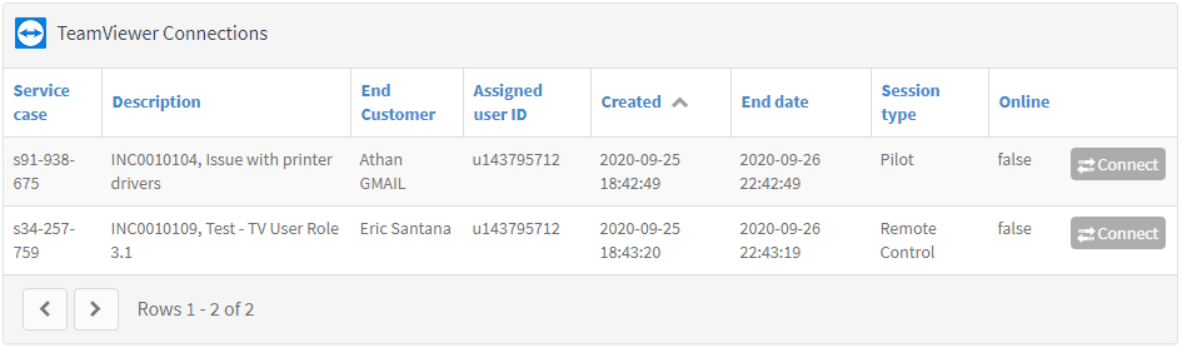
    The scheduled jobs and the *refresh* action use the time period defined in the scheduled job to determine how far back (in time) connection history must be retrieved. So, if the last job ran 6 hours ago and you update the repeat interval to 3 hours, you miss 3 hours of connection history if you do not run the job once first.



4. Update the repeat interval
5. Click on *Update*

1.7 Online Service Cases

Within the TeamViewer Enterprise Integration for ServiceNow application, a supporter can see all the online service cases from one view, using the Online Service Cases Widget, which can be accessed via TeamViewer Enterprise Integration → Online Service Cases.

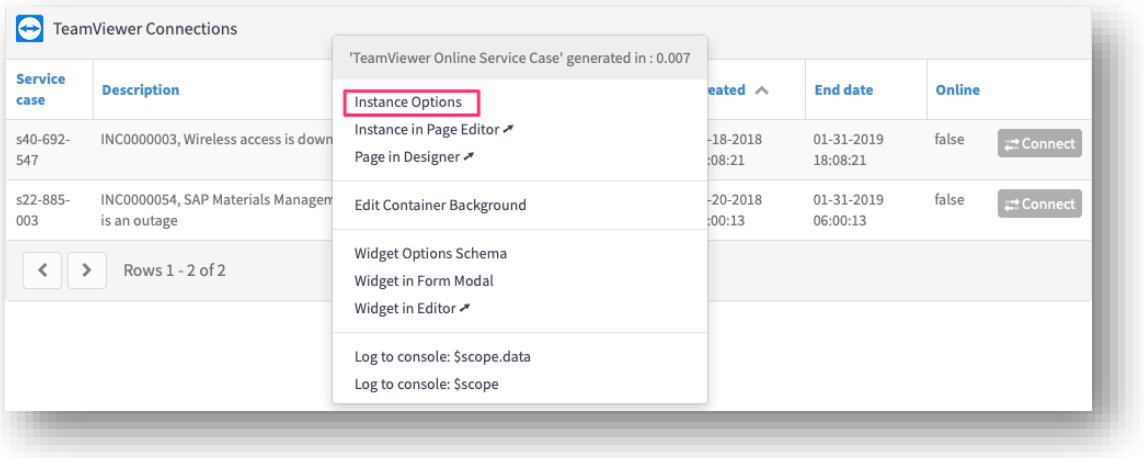


1.7.1 Changing the columns

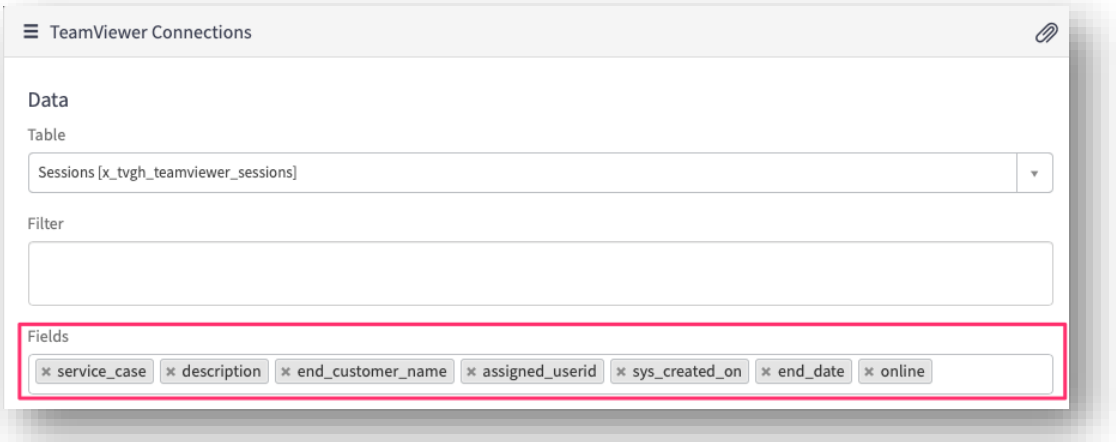
The columns shown in the Online Service Cases can be changed by the ServiceNow system administrators and impacts all users of the application. To change the columns, follow these steps to go into the widget instance options:

Role required: admin

1. Change your application (Settings > Developer > Application) to *TeamViewer Enterprise Integration for ServiceNow*
2. Go to TeamViewer Enterprise Integration > Online Service Cases
3. Press and hold *ctrl* on your keyboard and right click anywhere on the widget
4. Click on *Instance Options*



5. Add or remove any columns in the Fields list



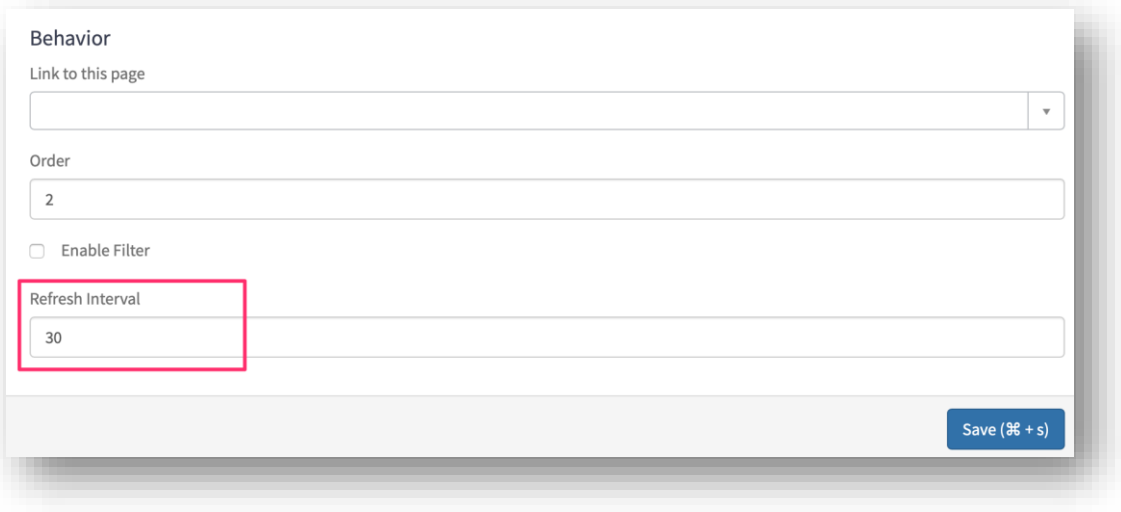
6. Click on *Save* at the bottom of the instance options dialog.

1.7.2 Change the refresh rate

The Online Service Cases Widget automatically refreshes the data as long as the page is kept open, by default the data is refreshed every 30s seconds. This can be changed by the ServiceNow system administrator.

Roel required: admin

1. Follow steps 1 -4 from the section 1.7.1.
2. Change the refresh interval to your preferred setting, the setting is in seconds



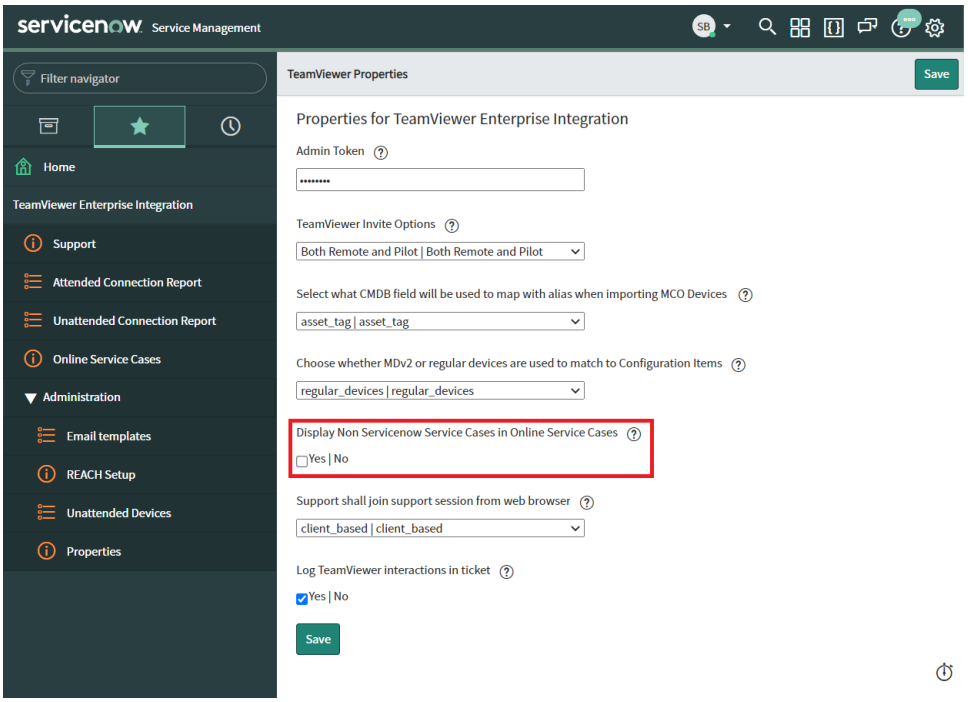
3. Click on *Save*

1.7.3 Display all service cases from TeamViewer

By default, only service cases from ServiceNow is visible, but one can show all available service cases in TeamViewer.

Roel required: admin

1) To show all service cases in TeamViewer, go to Administration -> Properties
2) Activate or deactivate displaying of non ServiceNow cases in Online Service Cases.



1.8 Configuring email templates

1.8.1 Introduction

The *Share Session Code* functionality on the TeamViewer Remote Control uses the standard Quick Message functionality from ServiceNow to send the session code per email to the customer. Administrators can define the templates for these quick messages.

Please note that for sending e-mails an e-mail service must be setup and activated in this instance. (System Properties > Email Properties)

1.8.2 Naming convention

Since we use the standard Quick Message functionality of ServiceNow, the Email window shows all the available Email templates in the ServiceNow instance, including email templates created for other applications. To distinguish the email templates for TeamViewer Integration, it is advised to use a clear naming convention for your Quick Messages, e.g.:

- TV_ShareSessionSimple
- TV_ShareSessionAdvance
- etc.

1.8.3 Creating and editing email templates

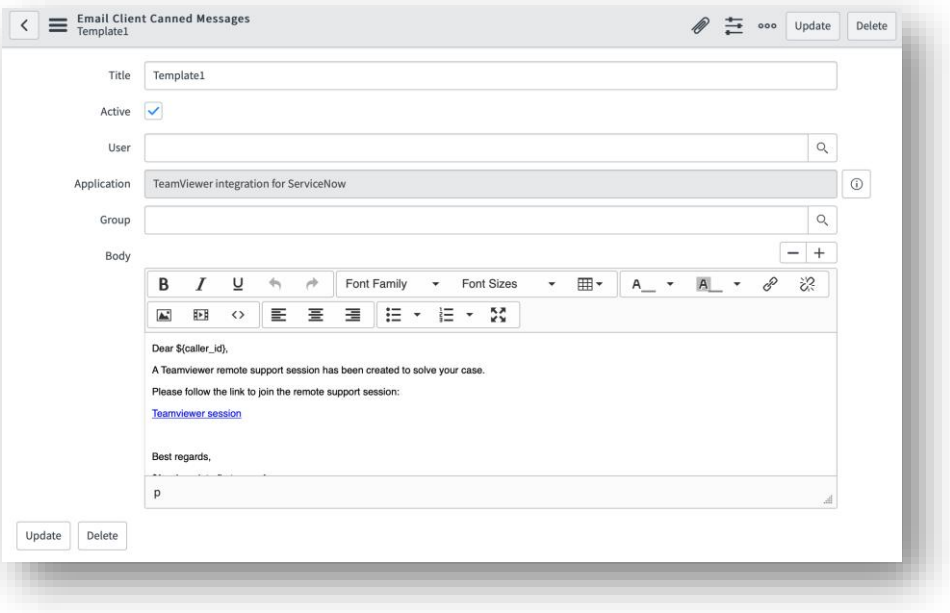
ServiceNow system administrators can create new quick message templates and edit existing templates. The email templates for the TeamViewer Integration for ServiceNow application can be accessed via the TeamViewer Integration application.

More information on creating an email template can be found in the ServiceNow documentation: https://docs.servicenow.com/bundle/utah-platform-administration/page/administer/notification/task/t_CreateAnEmailClientTemplate.html#t_CreateAnEmailClientTemplate

To edit or create an Email Template, follow these steps:

Role required: admin

1. Change your application (Settings > Developer > Application) to *TeamViewer Enterprise Integration for ServiceNow*
2. Go to TeamViewer Enterprise Integration > Email templates
3. Click on an existing Email Template or click on *New*
4. Fill in the form, you can use variables substitutions to use fields from the task record, e.g. *${caller_id}*



5. Click on *Update* (for an existing record) or *Submit* (for a new record)

1.9 Configure for use in Agent Workspace or Now® Experience UI Framework

1.9.1 Configure Attended and Unattended Access

TeamViewer meeting controls for attended and unattended access is now available for use in Agent Workspace and Now® Experience UI Framework forms (Quebec and later only).

The TeamViewer controls can be made available in the contextual side panel on incidents and task records, please follow these steps to set this up:

1. Navigate to: Workspace Experience > Actions & Components > Contextual Side Panel
2. Click “New” to create a new configuration record.
3. Fill the form (see image below for reference)
    a. Fill the following values in the main form section
        i. Action Label: “TeamViewer Controls”

ii. Action name: “TeamViewer-Controls”

iii. Implement as: UI Component

iv. Specify UI component: tvgh-teamviewer-control

v. Table: incident (this can also be any other task table)

vi. Order: set to “0” if you want this to be the default selected tab

vii. Icon: select an appropriate icon (e.g. “monitor outline”)

viii. Optionally, fill in the other values

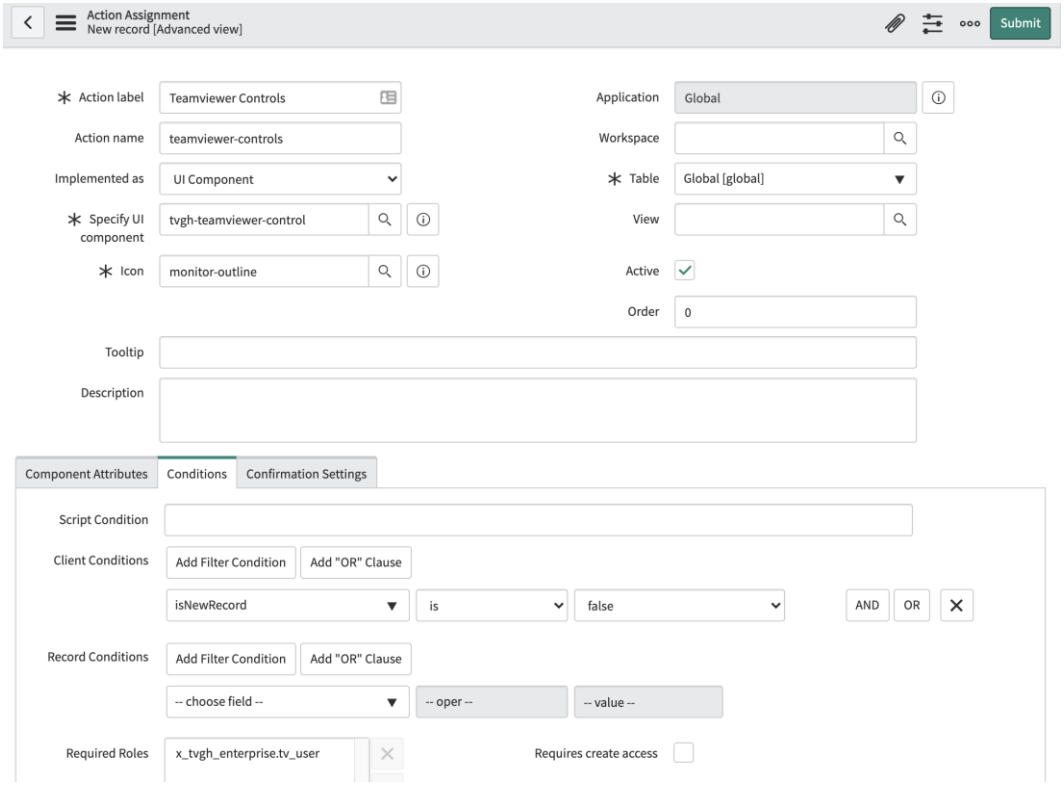
b. Fill the values under the conditions tab

i. Client conditions: isNewRecord – is – false

ii. Required Roles: x_tvgh_enterprise.tv_user

c. Clear the values under the Component Attributes tab to make sure they are picked dynamically from the page.

4. Save the form



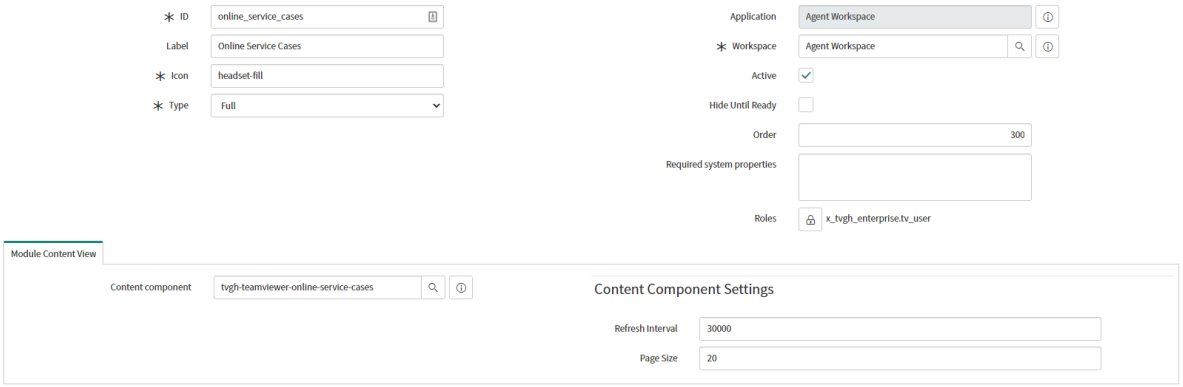
1.9.2 Configure Online Service Cases Workspace Agent Module

TeamViewer Online Service Cases is now available for use in Agent Workspace and Now® Experience UI Framework forms (Quebec and later only).

The TeamViewer Online Service Cases can be made available as a workspace module, please follow these steps to set this up:

1. Navigate to Workspace Experience > Workspaces > Administration > All Workspaces and click a workspace
2. On the Workspace Modules tab, click New to create a new application module for your workspace (Please make sure you are in the same application scope in which the experience is created. If you for example want to add the “Online Service Cases” to Agent Workspace you should create the new workspace module in the Agent Workspace application scope. Please use the Application Picker to select the scope – see screenshot below)

3. Fill the form (see image below for reference)
    i. ID: online_service_cases
    ii. Label: Online Service Cases
    iii. Icon: headset-fill
    iv. Type: Full
    v. Content Component: tvgh-teamviewer-online-service-cases
    vi. (optional configuration) Page Size: controls the maximum number of records shown at a time. Defaults to 20 records.
    vii. (optional configuration) Refresh Interval: controls how frequently (in milliseconds) the list is refreshed. Defaults to 30000 (30s).

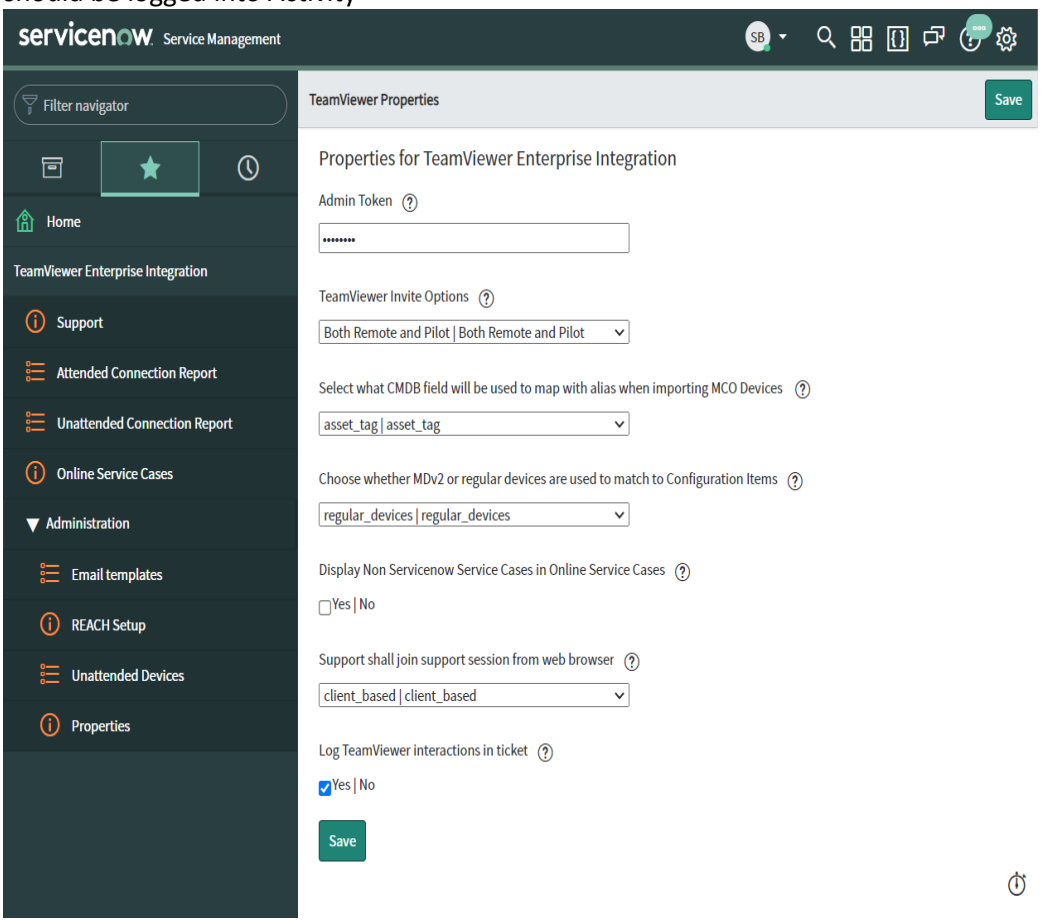


1.10 Configure logging service cases status into task activity

Role required: admin

1. Connect to ServiceNow with the required user and role(s)
2. Go to module within the Application: Administration → Properties

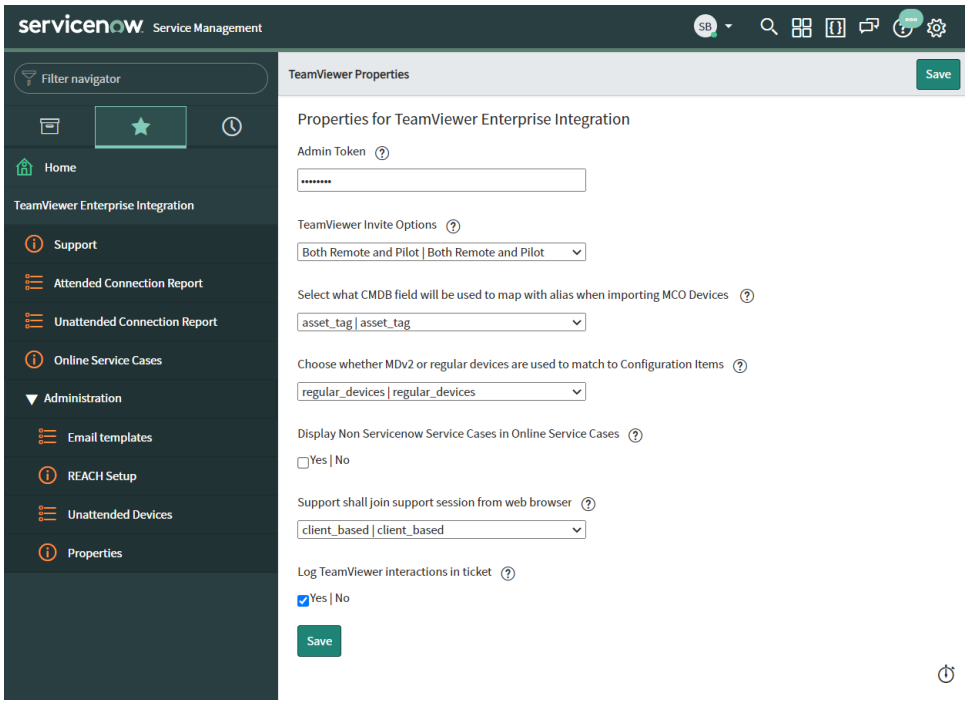
3. Set under “Log TeamViewer interactions in ticket” if opening and cancelling service cases should be logged into Activity



1.11 TeamViewer supporter link direct to browser or client configuration

Role required: admin

1. Connect to ServiceNow with the required user and role(s)
2. Go to module within the Application: Administration → Properties
3. Set under “Support shall join support session from web browser” if supporter links opens to browser based or client based TeamViewer.



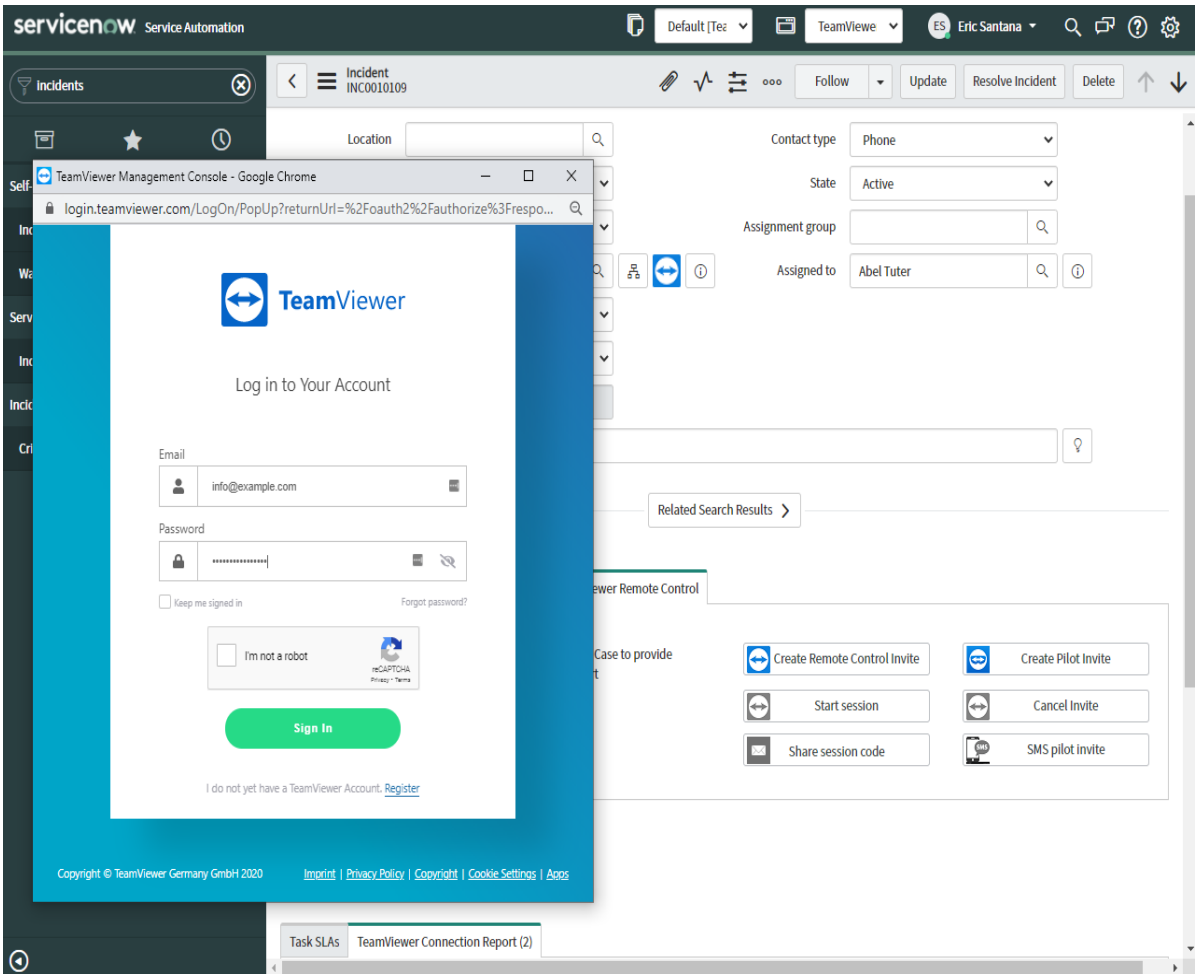
Using the integration

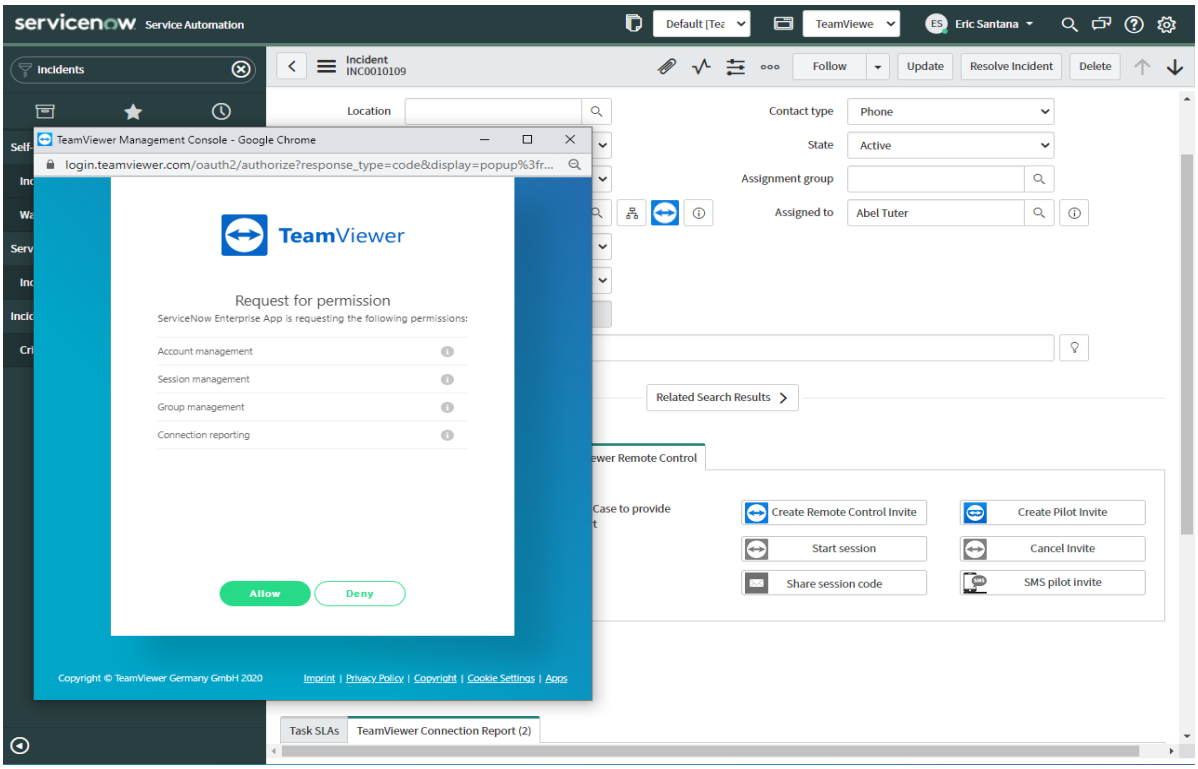
1.12 Introduction

Once the TeamViewer Enterprise Integration app has been properly installed and configured, it can be used to create service cases, via “Create Remote Control Invite” or “Create Assist AR Invite”, and remotely access and control end users’ devices.

1.13 Creating TeamViewer Service Cases

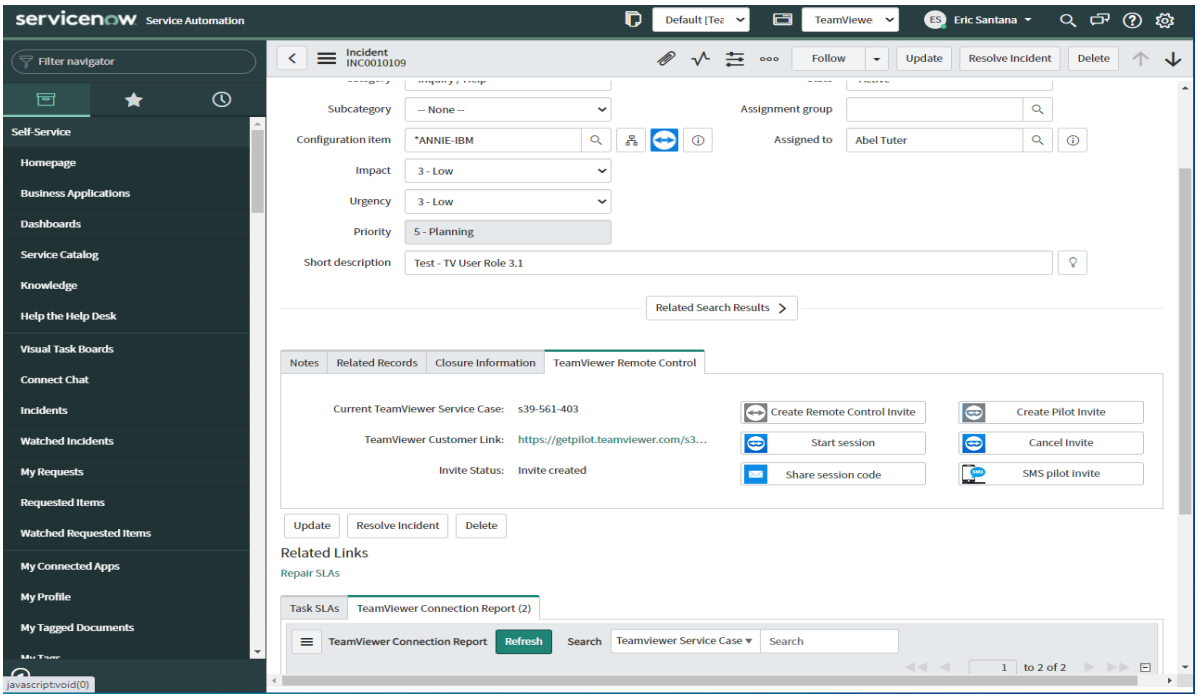
The first time each user attempts to create a service case, he/she will be prompted to login with their TeamViewer credentials as shown below.





This will only need to happen once per user and his/her access-token will be stored in the ServiceNow platform until revoked by the user or the administrator from the TeamViewer Management Console.

After the user has logged in successfully, the service case will be created. An example is shown in the screenshot below:

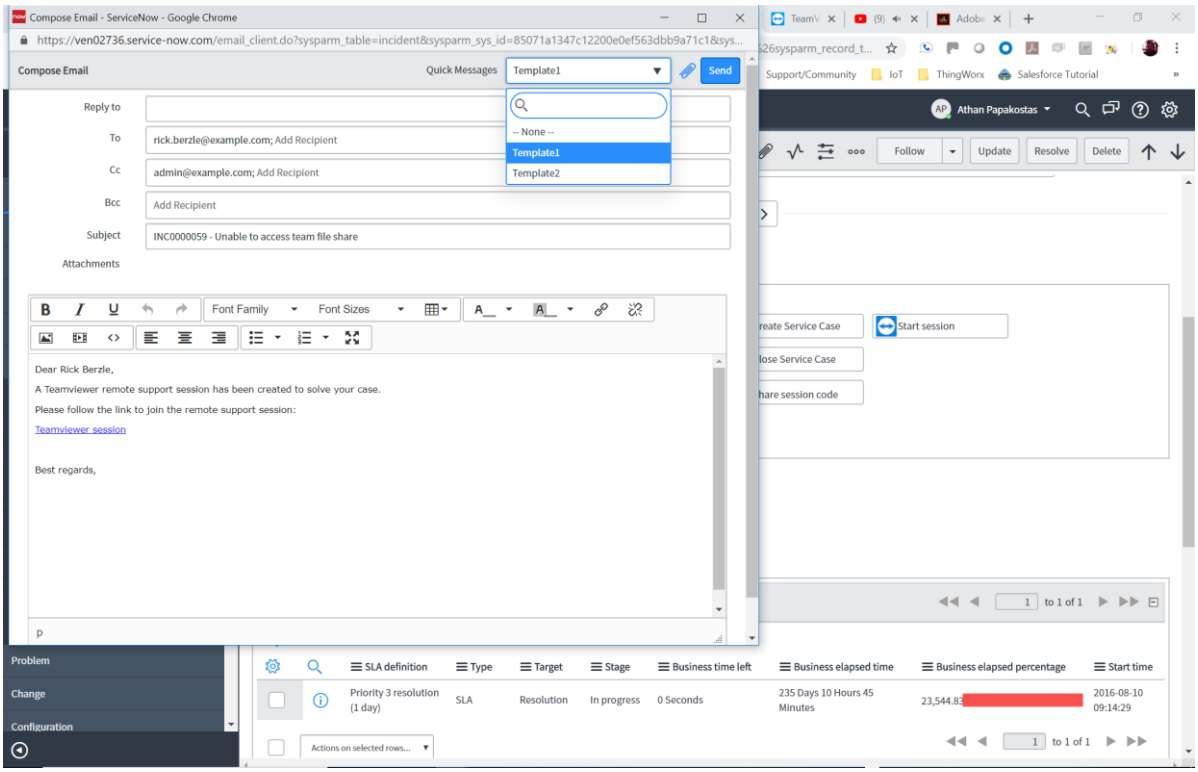


1.14 Sharing Service Cases and establishing a connection

1.14.1 Share Session Code

Once the service case has been created, the supporter can easily share the session link with the end user by clicking "*Share session code*". That will open the email window where the supporter can select a pre-defined email template. Please be aware that multiple templates, also for other applications, might exist in your system and the TeamViewer email template is not pre-selected.

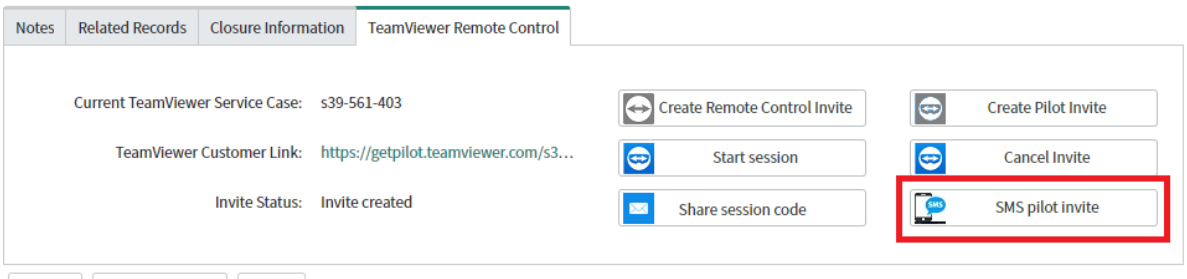
The end users email address and name as well as the customer link and the subject/body text of the email can be automatically populated through the pre-configured templates. In the screenshot below an example is shown.



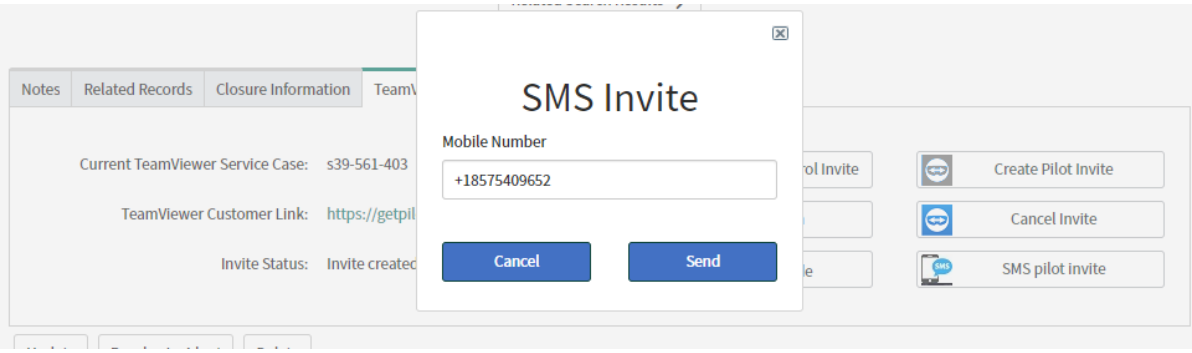
The supporter can then select 'Start Session' immediately and will wait in a virtual lobby until the end user clicks the link after which point the remote-control session will be established. Otherwise the supporter can wait until the end user selects the link first (in which case he/she will appear as online in the Active sessions screen) and then start the session.

1.14.2 SMS Assist AR Invite

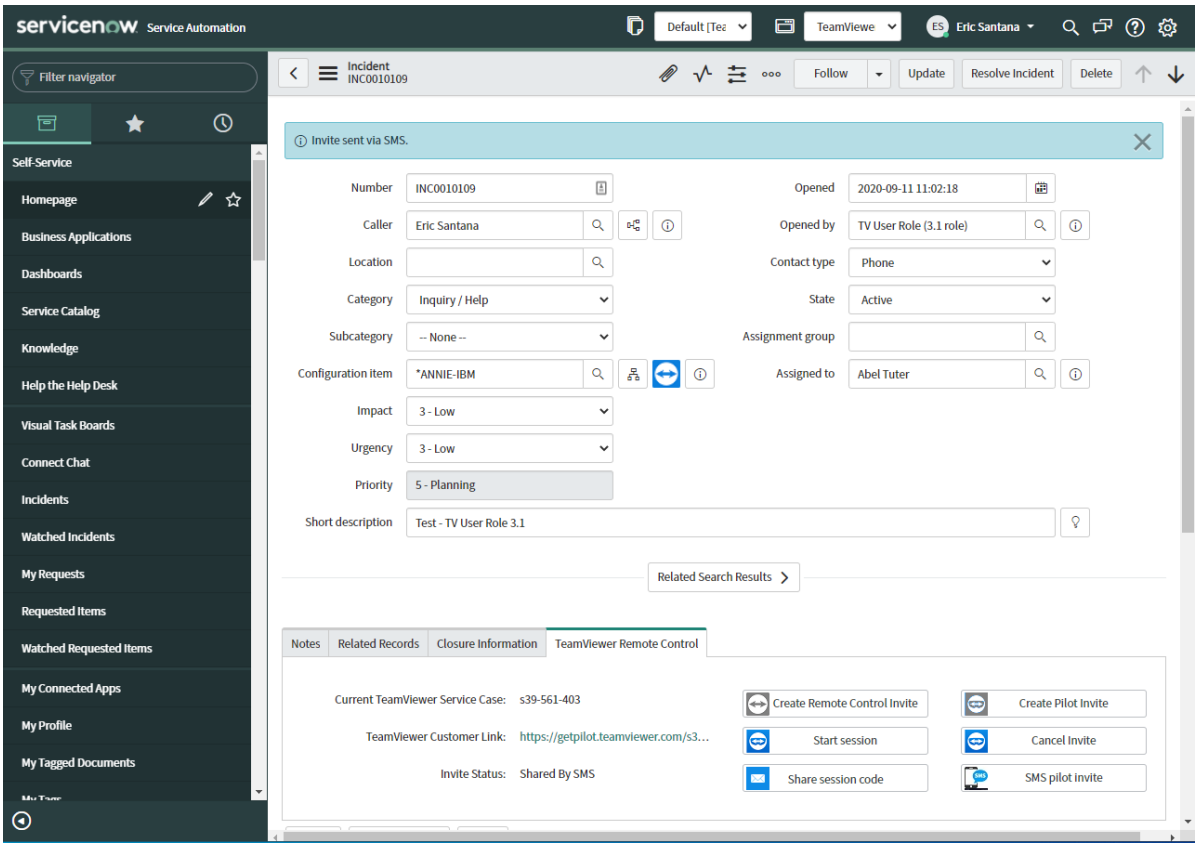
If a supporter creates a Service Case via Assist AR Invite, the supporter can send a text message (SMS) to the end user with the link to initiate an Assist AR session. This can be done by clicking the "SMS Assist AR invite" after an Assist AR invite has been created as shown below:



After the supporter clicks the above button, a pop up window will show up with a pre-populated phone number gathered from the end user's record (referenced in the Caller field of the incident/task) in ServiceNow as shown below:



The supporter must verify that the number is in the international format before clicking the Send button. After clicking send and the phone number is valid, the supporter will be notified, on top of the form, that an invite has been sent to the customer as shown below:

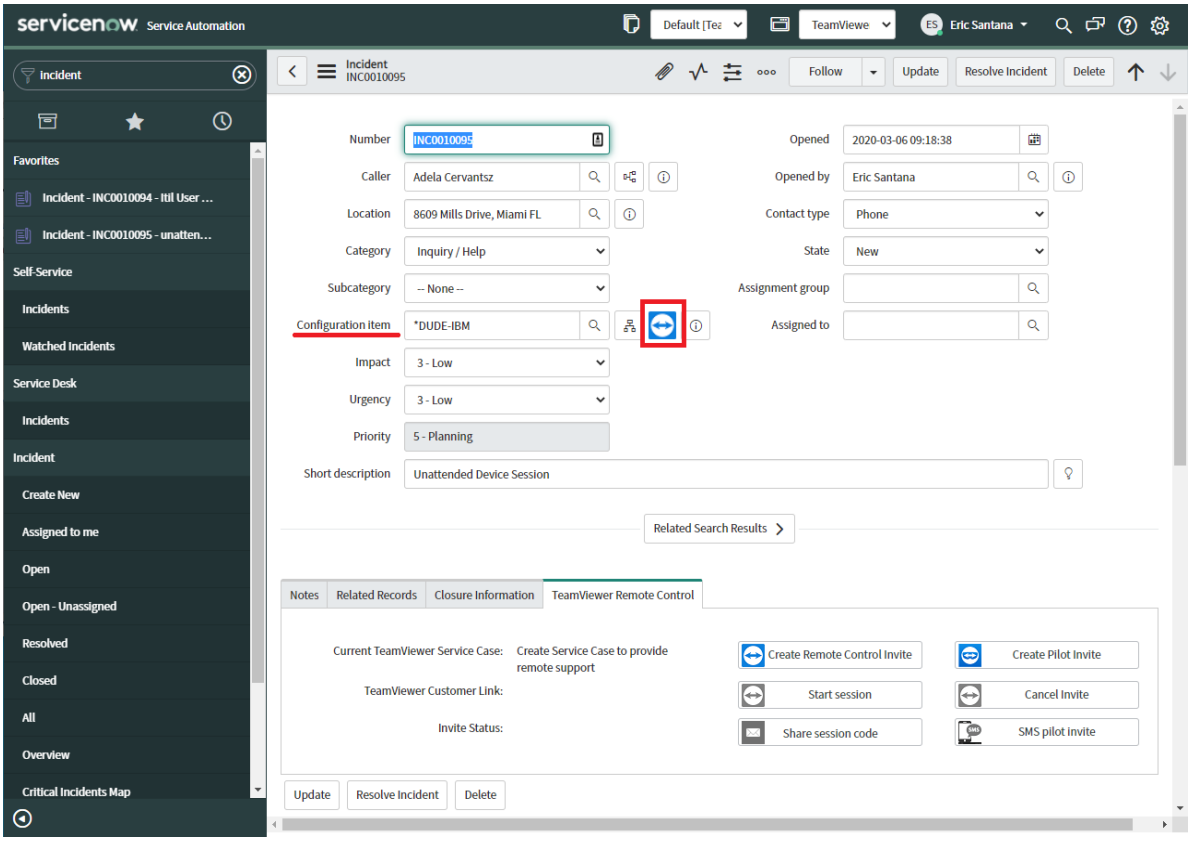


The supporter can then select ‘Start Session’ immediately and will wait in a virtual lobby until the end user clicks the link after which point the remote-control session will be established. Otherwise the supporter can wait until the end user selects the link first (in which case he/she will appear as online in the Active sessions screen) and then start the session.

Please note: In order for this this feature to work properly, the supporter needs to have a TeamViewer Pilot subscription assigned to him/her.

1.15 Initiate TeamViewer Unattended Session

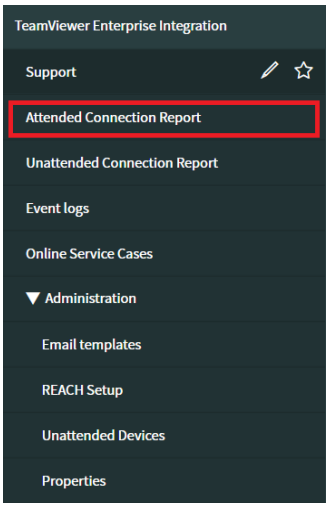
In any task-based records, like Incidents, that has a field with reference to a configuration item (or its children tables) that is properly registered for Unattended Access (from Section 8.3), supporters can start an Unattended Session to that device (as long as the device is online and has TeamViewer app running) by clicking on the TeamViewer Icon located on the right side of the configured field on a task form as shown here for example:



1.16 View Connection Reports

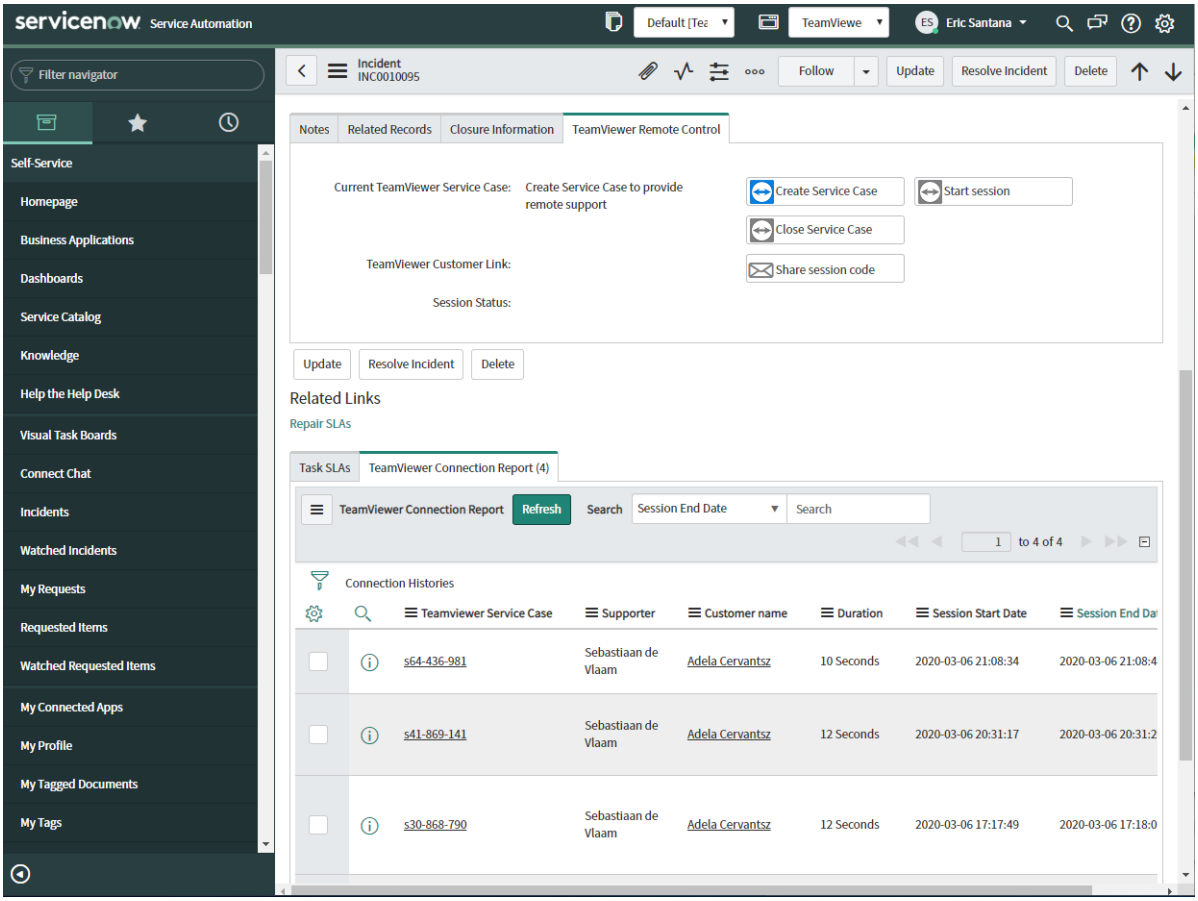
1.16.1 Attended Connection Report

In the TeamViewer Enterprise Integration application, you can see company-wide reports of Attended Connections by going into the module *Attended Connection Report* as shown here:



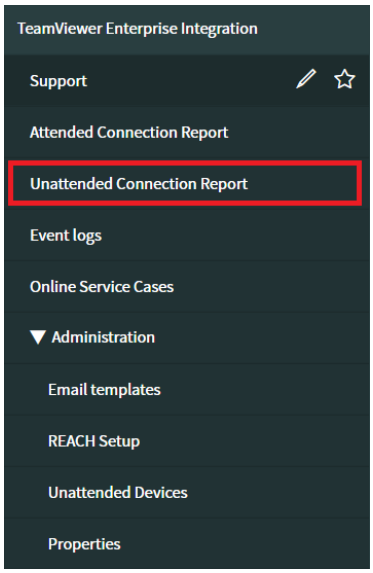
Furthermore, in every module (Incident, Problem, Change Request, Control Request) the admin has the ability to add a Related list object with the list of remote-control sessions used to solve the specific incident.

The list is refreshed either when a service case is closed or when the 'Refresh' button is pressed. Below is an example of the connection report.



1.16.2 Unattended Access Report

In the TeamViewer Enterprise Integration application, you are able to see company-wide reports of Unattended Connections by going into the module *Unattended Connection Report* as shown here:



1.16.3 Event Logs

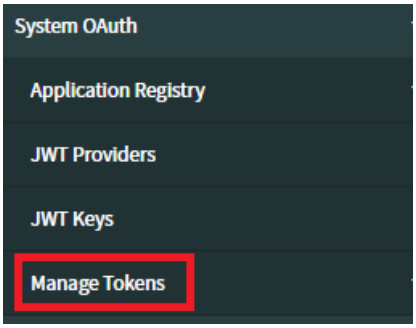
When viewing a Access Report, you are able to view the event logs generated during the session. To view them, open up a report and view the related lists at the bottom.

There are different types of event logs: File transfer, screen blacked out, remote input disabled, session recording and action steps. Each one of them has their own separate table (extended from the Event logs table) where additional information might be stored. There are other type of event logs that we do not consider relevant at the moment. Those event logs stay at the “default” Event logs table.

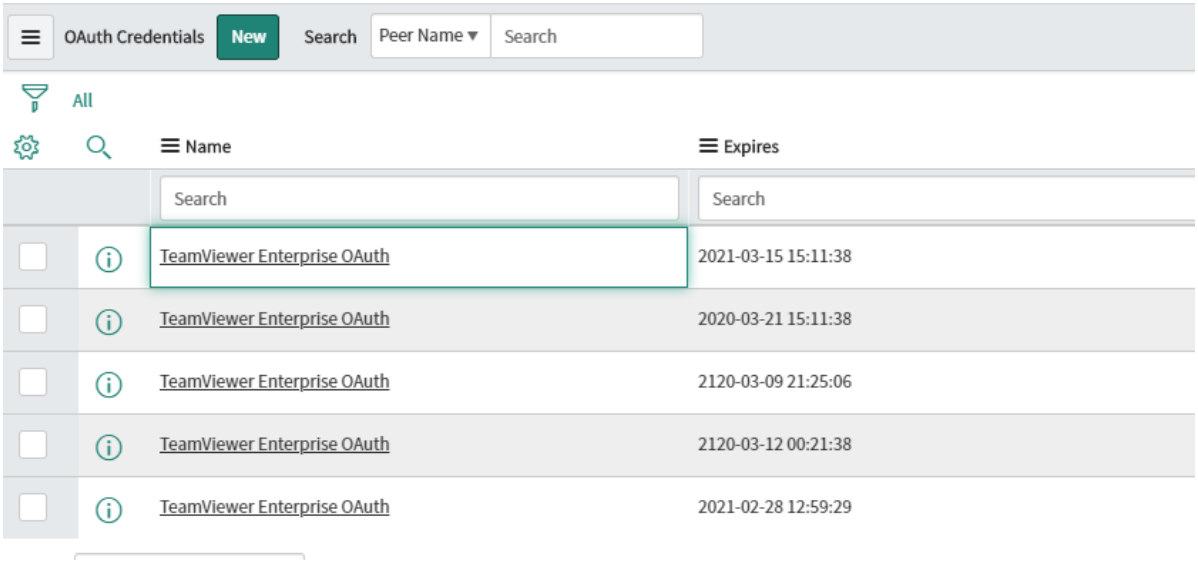
1.17 OAuth Token Management

Role Required: Admin

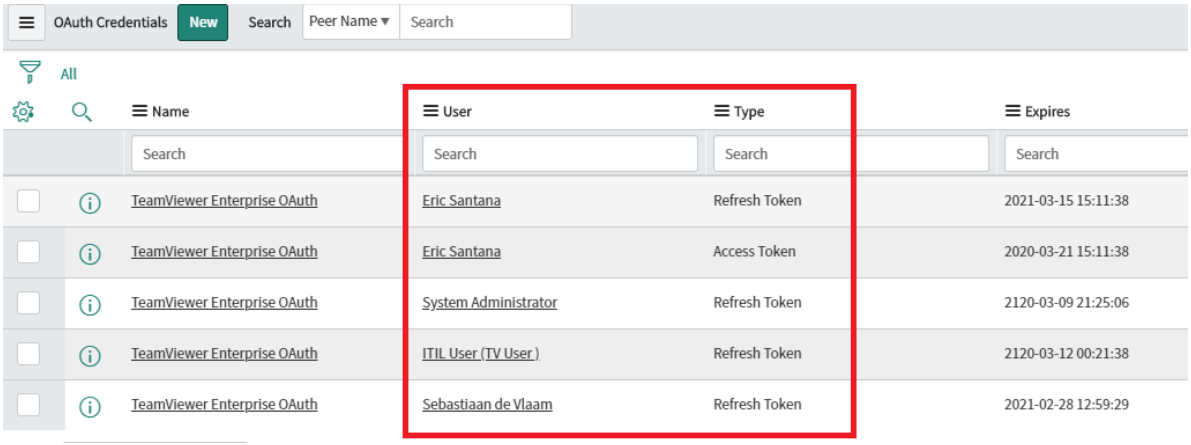
When Supporters logs into their TeamViewer Account in ServiceNow when creating a Service Case, ServiceNow stores the User’s Access Token and Refresh Token in the ServiceNow’s OAuth Credentials [oauth_credential] table. You can find the list of tokens under module System *OAuth -> Manage Tokens*:



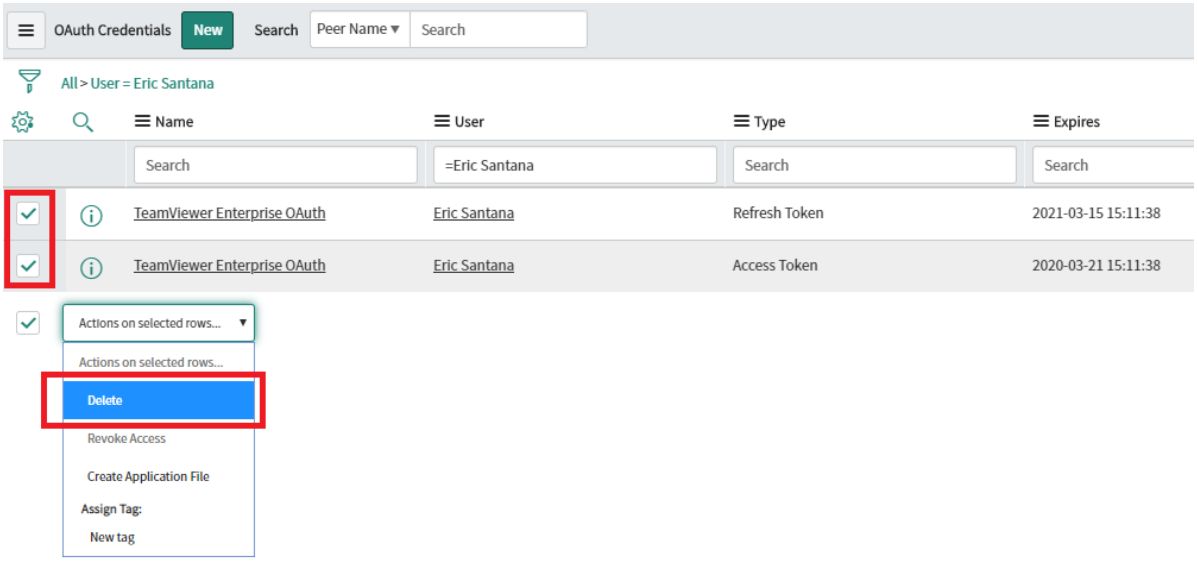
In this list you can review the Tokens stored for this application under the name **TeamViewer Enterprise OAuth**:



To see what user tokens and type of token are stored in the above list, you can personalize the columns by pressing the gear button  ,located on the left side of the page, and add the Columns User and Type as shown below:



From here, you can revoke access to TeamViewer by selecting the User's Refresh and Access Token and delete with the Delete UI Action button. For example:



Upgrading from TeamViewer Remote Support Integration

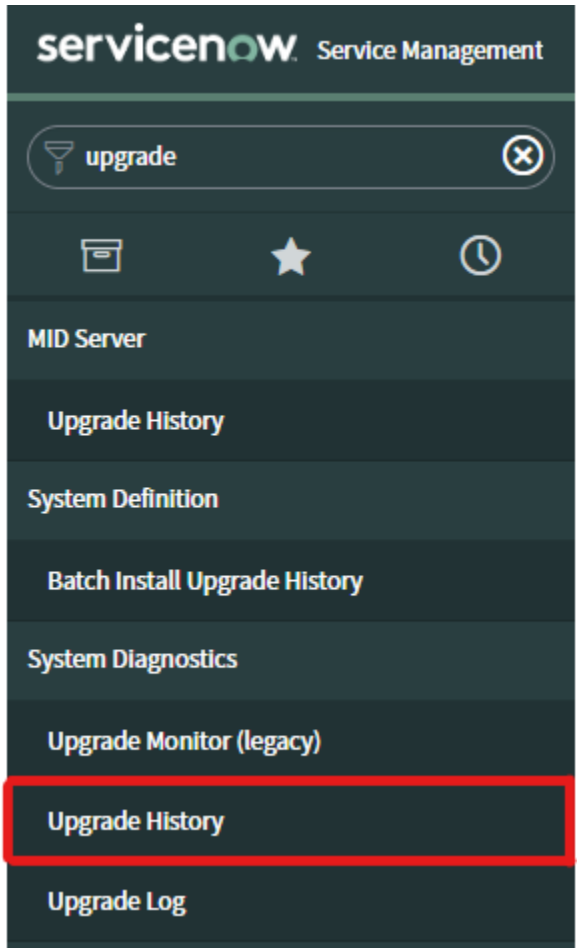
1.18 Introduction

This section will go over the process of upgrading from TeamViewer Remote Support Integration Application installed in your instance to TeamViewer Enterprise Integration as these two applications are in different scopes and store data in different tables. This guide will instruct how to import the data into TeamViewer Enterprise and how to properly install the application

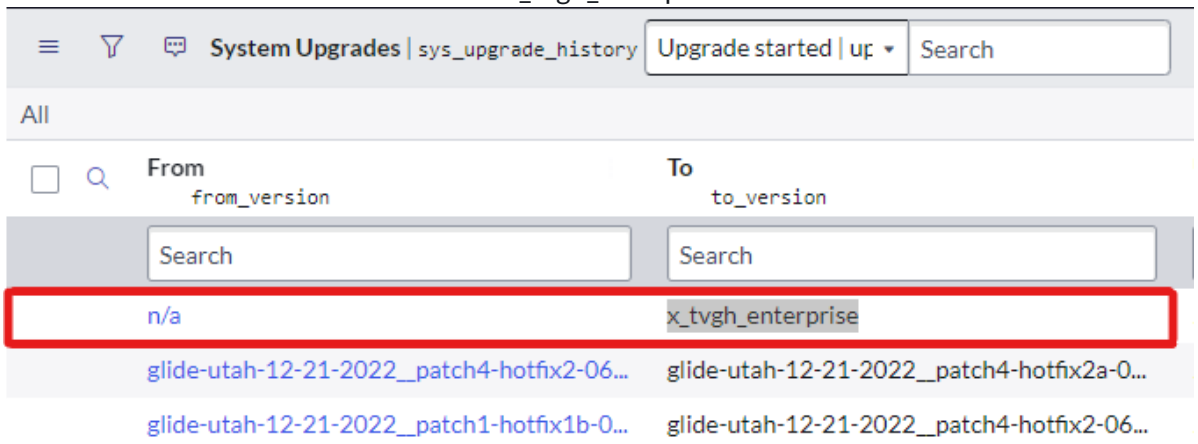
1.19 Upgrading from before TeamViewer Enterprise 3.4

When upgrading from before TeamViewer Enterprise 3.4, a possible upgrade issue may occur, where generating or viewing sessions does not work anymore. If this occurs, this following steps may help rectify it.

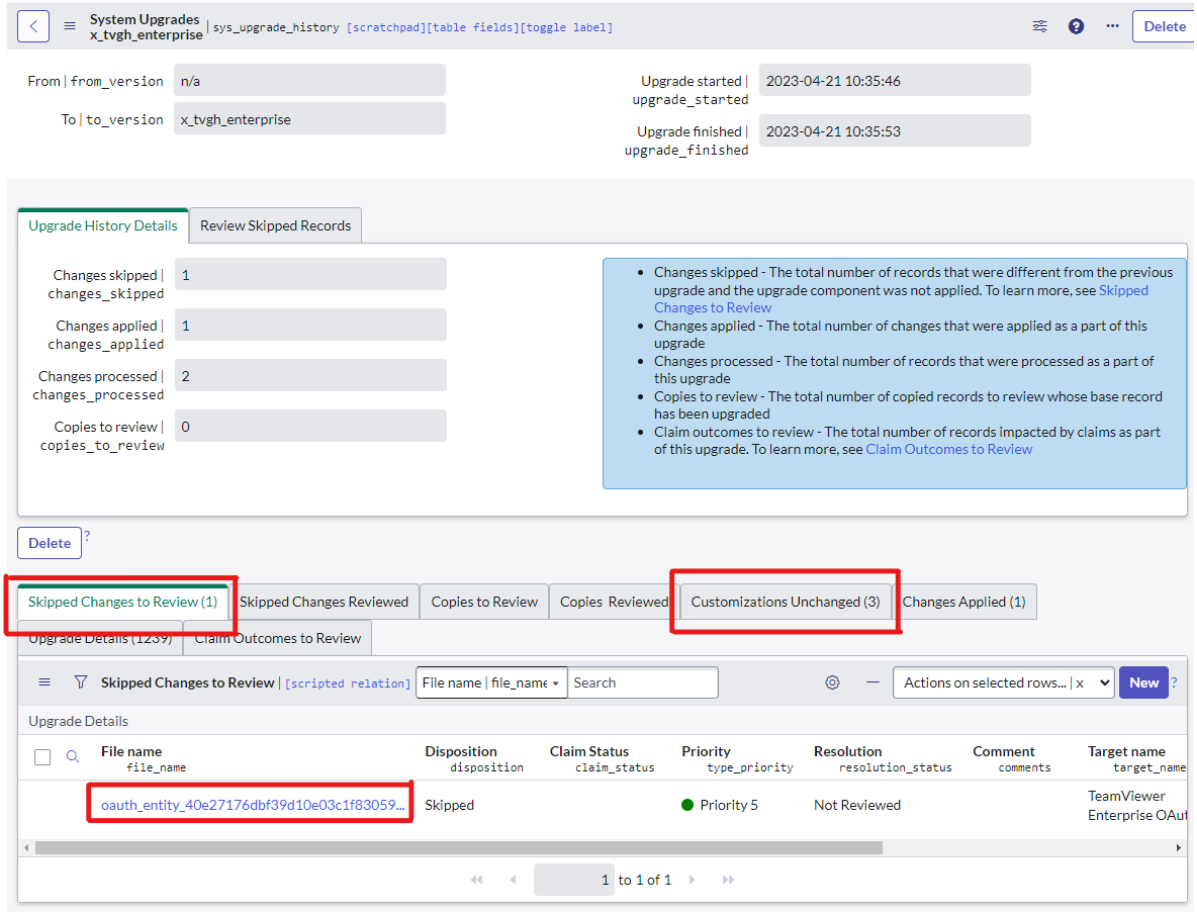
1. Go to System Diagnostics -> Upgrade History



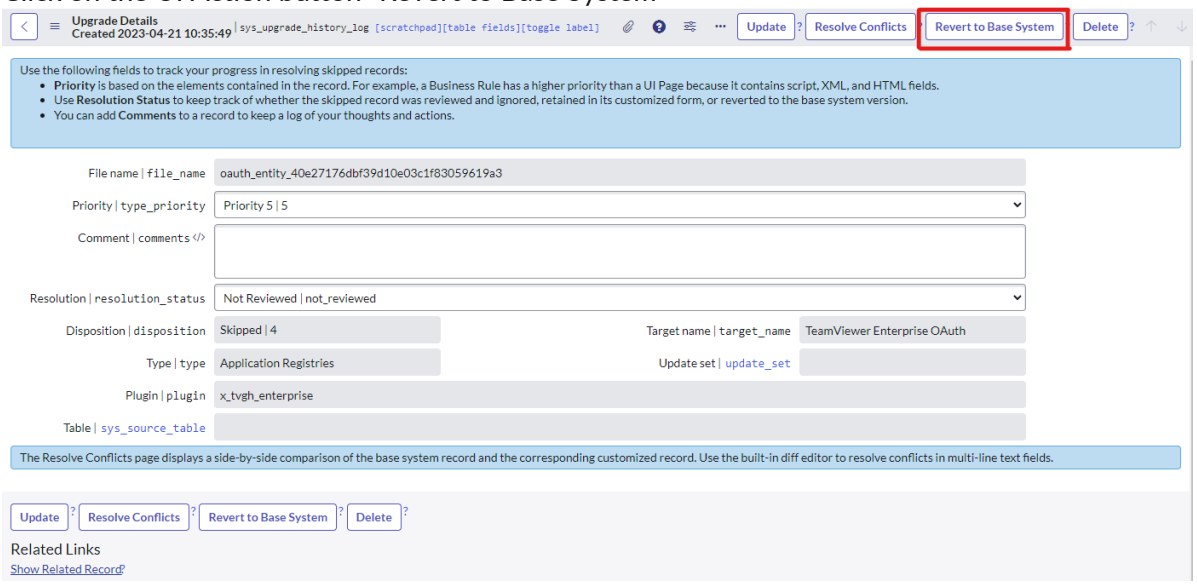
2. Open the record relating to your upgrade of TeamViewer Enterprise. This can usually be found in the "To" column with the name "x_tvgh_enterprise"



3. With the record open, look for the tab "Skipped Changes to Review", and look for a record with the file name "oauth_entity_40e27176dbf39d10e03c1f83059619a3". If this record does not exist, look for the same record under "Customizations Unchanged". If you could not find this, perhaps look for another upgrade record from step 2. If you found this record, open it.



4. Click on the UI Action button “Revert to Base System”



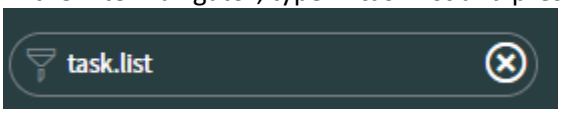
5. Upon reverting this record, open the TeamViewer Enterprise plugin under the Plugins page, and click on “Repair Application”

The TeamViewer functionalities should now work again.

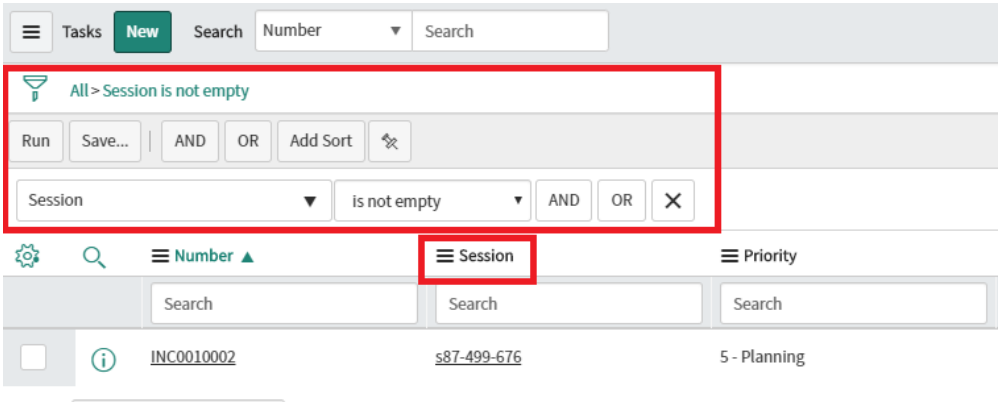
1.20 Upgrade Guide

Role Required: Admin

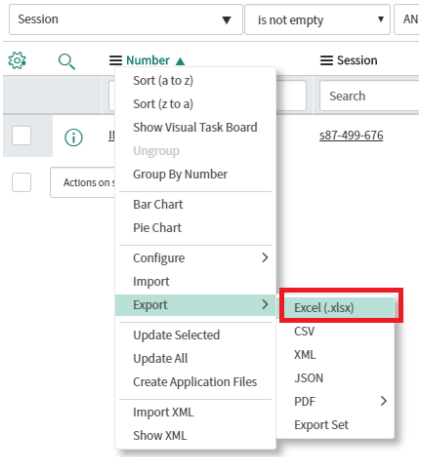
1. Backup Data from TeamViewer Remote Support Integration
    a. Backup Task [task] Records with A Session Reference
        i. In the filter navigator, type in **task.list** and press enter:



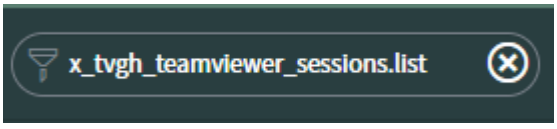
        ii. In the list, personalize your columns with the gear icon to add the **Session** field to the list view. Then filter the list with **Session is not empty** as shown here:



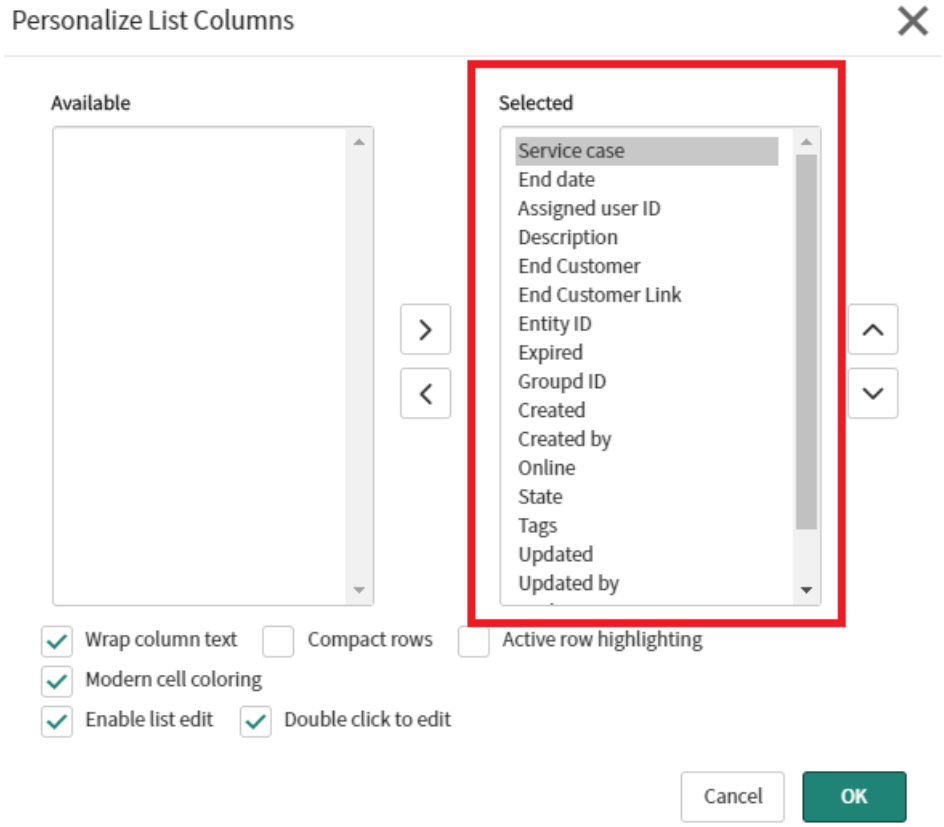
        iii. If the list is not empty, export this filtered list as an Excel, and download the file, as shown here:



    b. Backup Sessions [x_tvgh_teamviewer_sessions] records
        i. In the filter navigator, type in **x_tvgh_teamviewer_sessions.list** and press enter:



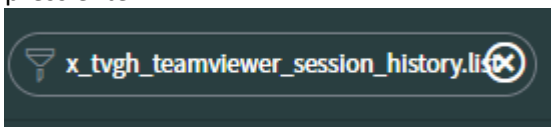
        ii. In the list, personalize your columns with the gear icon to add all available fields to the list view as shown here and click OK:



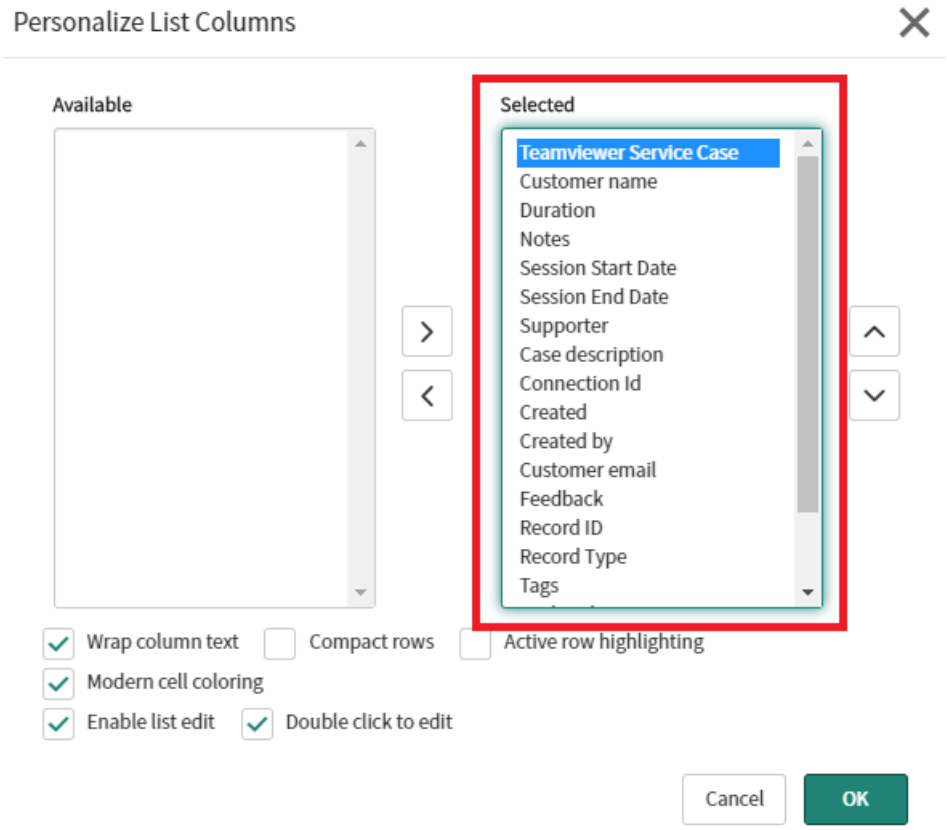
iii. Export this list as an Excel, similarly to step 1.iii , and download the file.

c. Backup TeamViewer Connection Report [x_tvgh_teamviewer_session_history]

i. In the filter navigator, type in **x_tvgh_teamviewer_session_history.list** and press enter:



ii. In the list, personalize your columns with the gear icon to add all available fields to the list view as shown here and click OK:

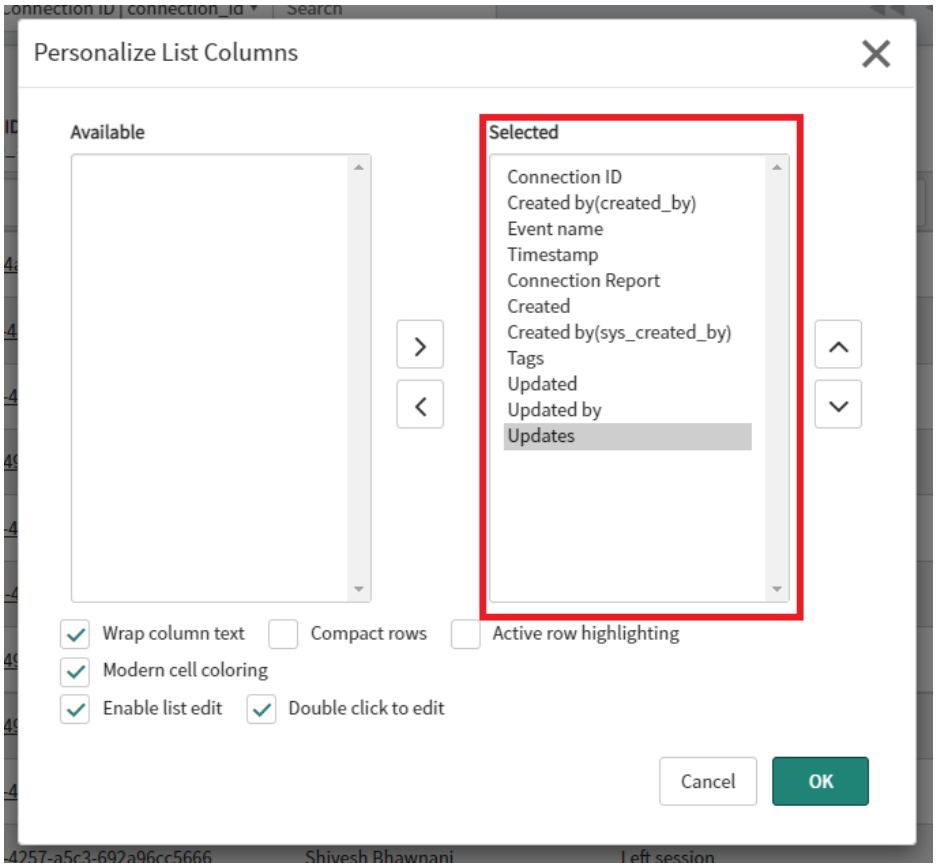


iii. Export this list as an Excel, similarly to step 1.iii , and download the file.

d. Backup TeamViewer Event Logs [x_tvgh_teamviewer_event_log]

i. In the filter navigator, type in **x_tvgh_teamviewer_event_log.list** and press enter:

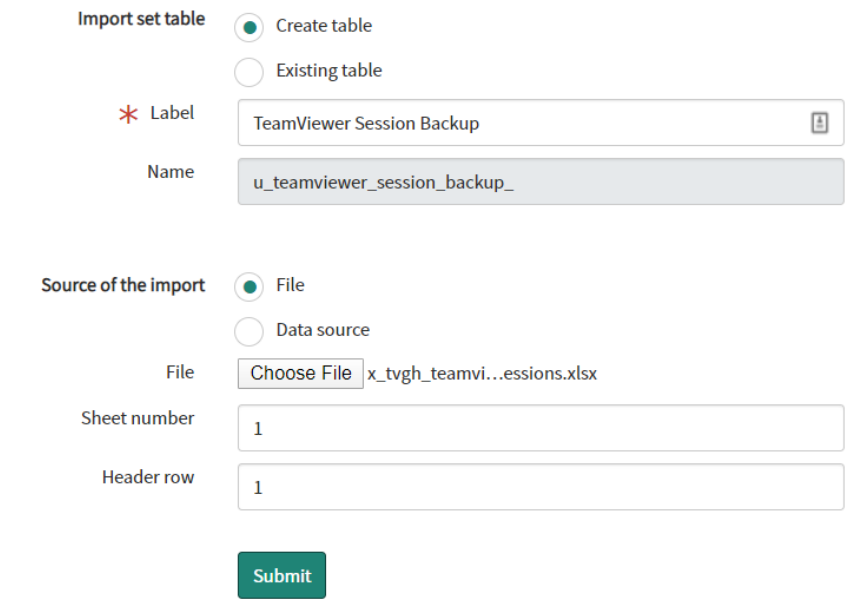
ii. In the list, personalize your columns with the gear icon to add all available fields to the list view as shown here and click OK:



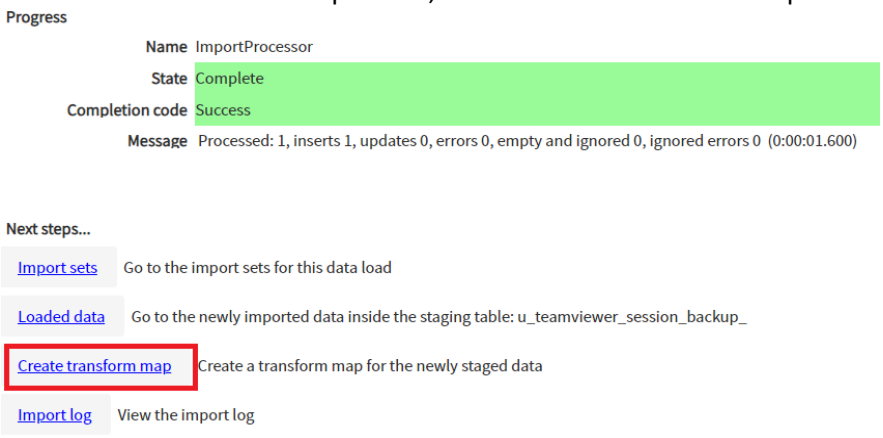
iii. Export this list as an Excel, similarly to step 1.iii , and download the file.

2. Uninstall TeamViewer Remote Support Integration. For details on how to uninstall the application can be found here from ServiceNow: https://docs.servicenow.com/bundle/vancouver-application-development/page/build/applications/task/t_DeleteAnApplication.html
3. Install TeamViewer Enterprise Integration for ServiceNow. For details on how to install the application can be found here from ServiceNow: https://docs.servicenow.com/bundle/vancouver-application-development/page/build/applications/task/t_InstallApplications.html
4. Load backup data and Import Data
   In this part of the guide, it will use the Import Set feature in ServiceNow to load the data from the original application. ServiceNow Documentation on Import Sets can be found here: https://docs.servicenow.com/bundle/vancouver-integrate-applications/page/administer/import-sets/reference/import-sets-landing-page.html

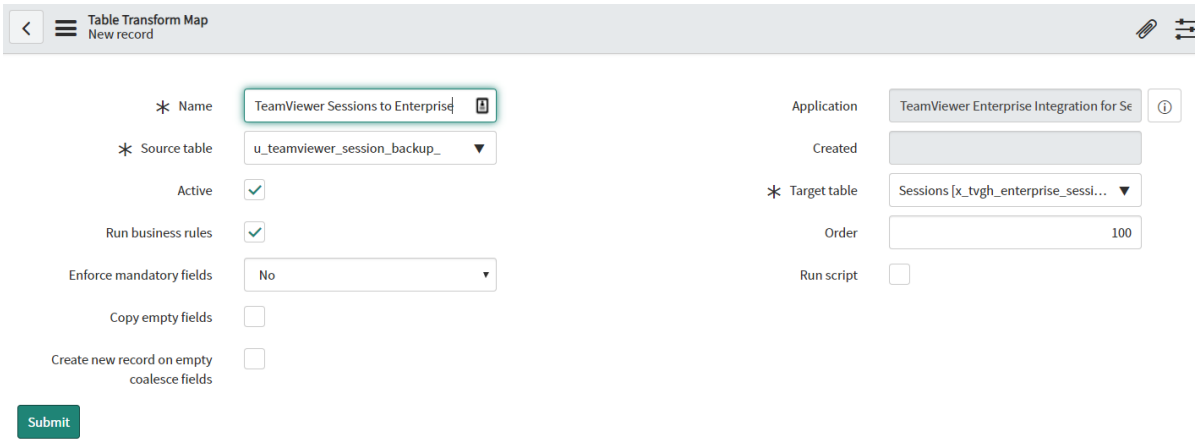
   a. Import Session Data from the backup Excel file created in Step 1.b.iii
      i. Go to module *System Import Sets -> Load Data* and create a new Import Set table called TeamViewer Session Backup and upload the file from Step 1.b.iii. Afterwards click on Submit, as shown here:



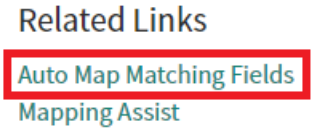
ii. After the file is uploaded, click on Create transform map as shown here:



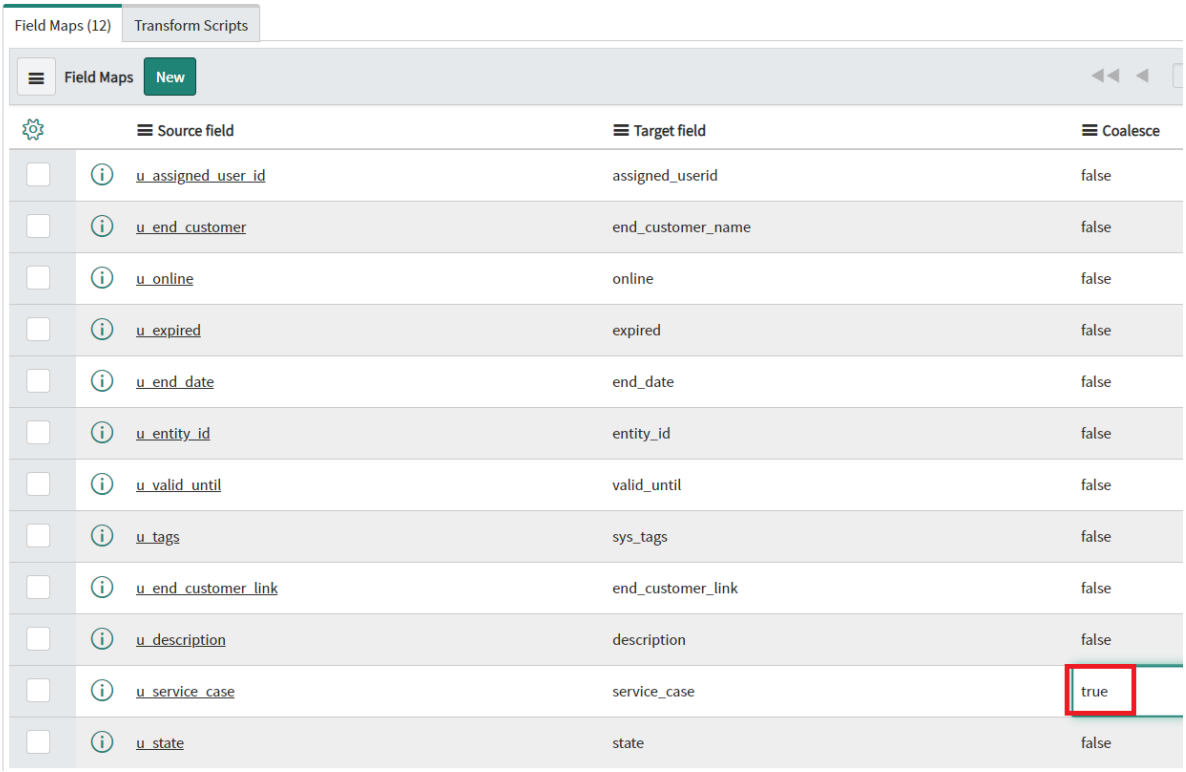
iii. Create the transform map in with the following configuration and Save on the record:



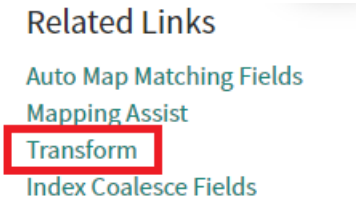
iv. Then on the form, click on Auto Map Matching Fields, in Related Links, to match the fields properly in the import process:

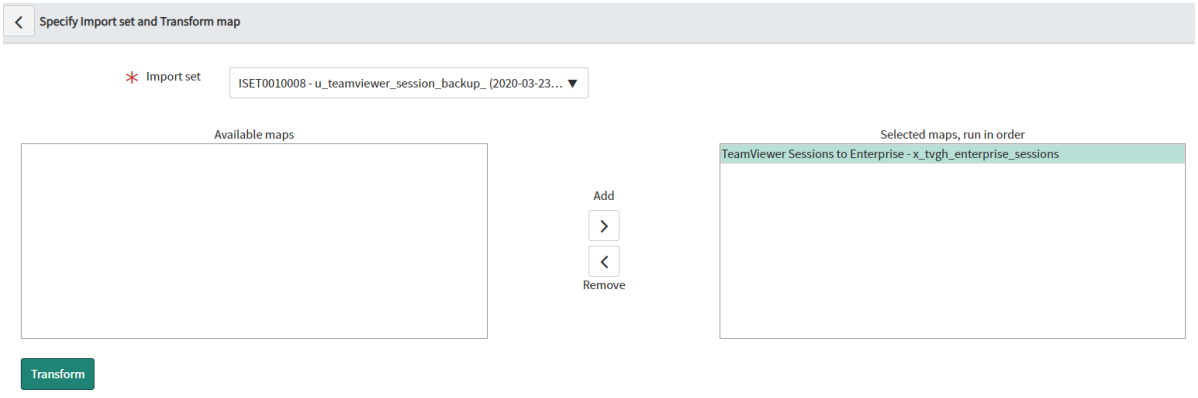


v. Review the generated Field Maps and make the Service Case field's Coalesce to true, as shown here:

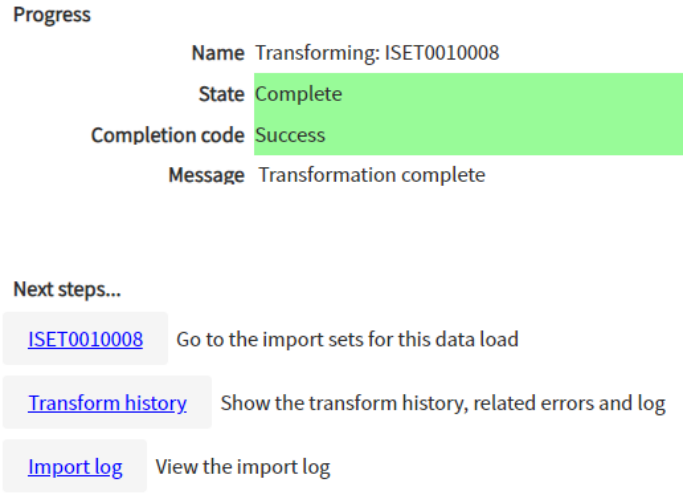


vi. Afterwards, click on Transform and select the Map TeamViewer Sessions to Enterprise and click on Transform:

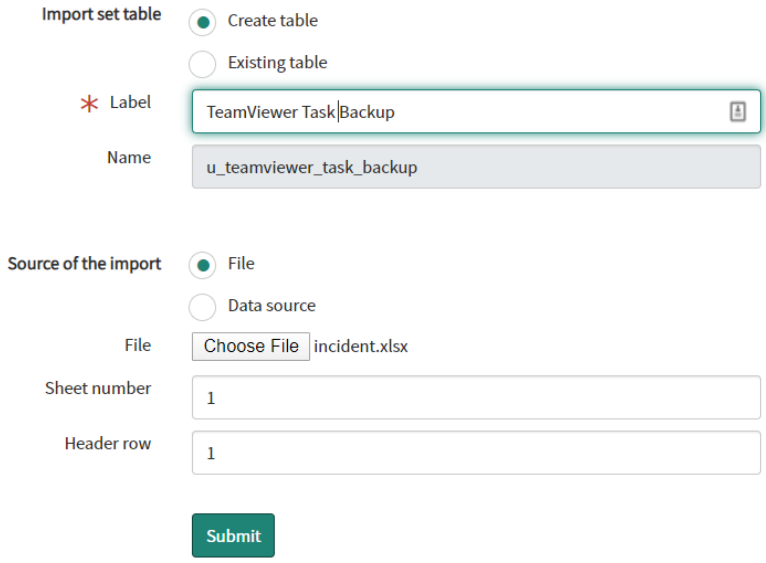




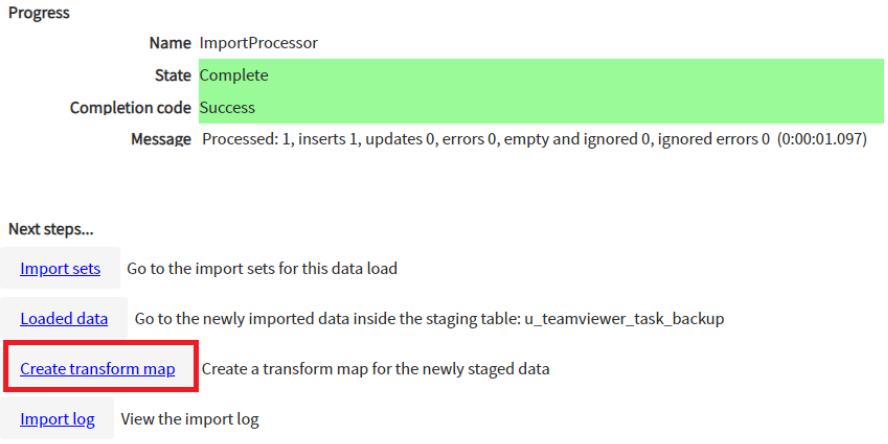
vii. Review your results. If successful, the import is complete as shown here:



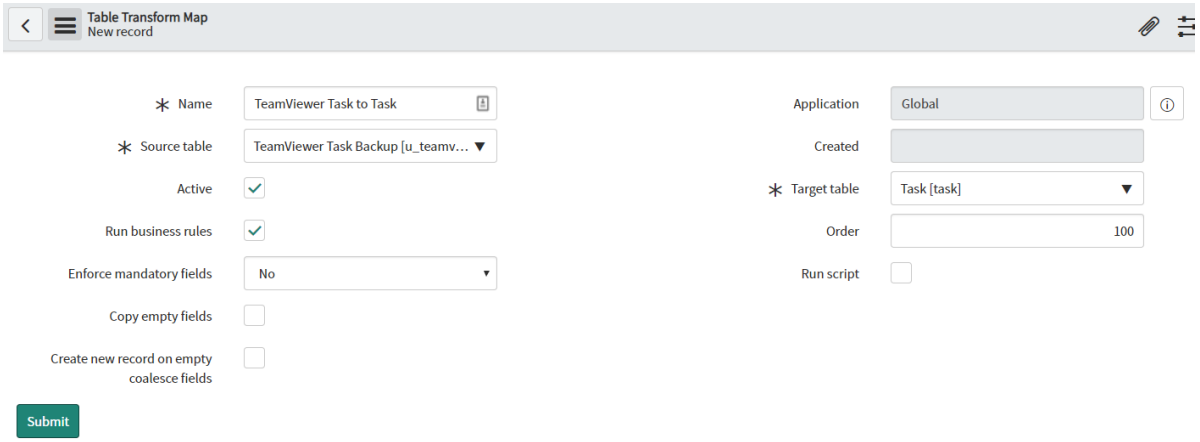
b. Update Task Records based on the backup Excel file created in Step 1.a.iii
   i. Go to module *System Import Sets -> Load Data* and create a new Import Set table called TeamViewer Task Backup and upload the file from Step 1.a.iii. Afterwards click on Submit, as shown here:



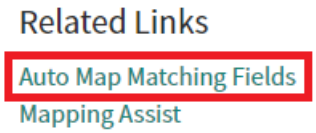
   ii. After file is uploaded, click on Create transform map, as shown here:



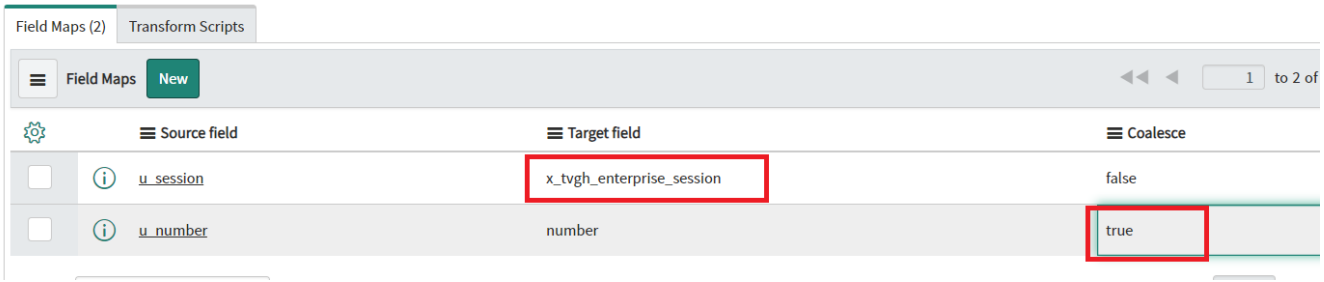
   iii. Create the transform map in with the following configuration and Save on the record:



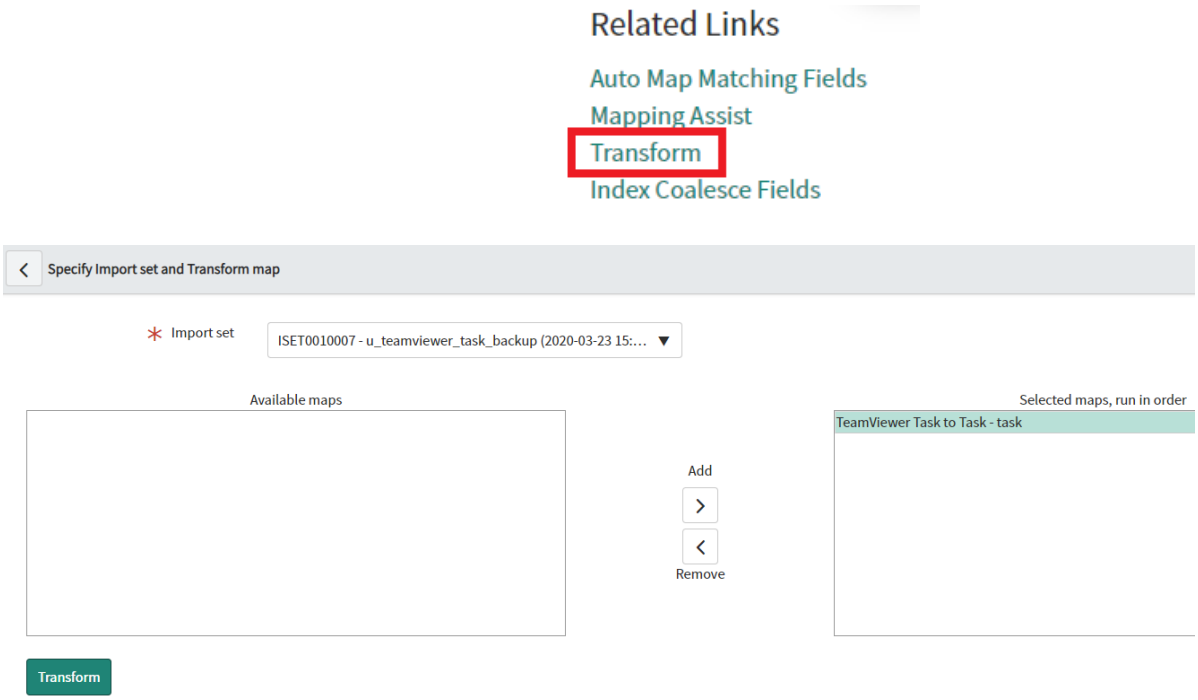
iv. Then on the form, click on Auto Map Matching Fields, in Related Links, to match the fields properly in the import process:



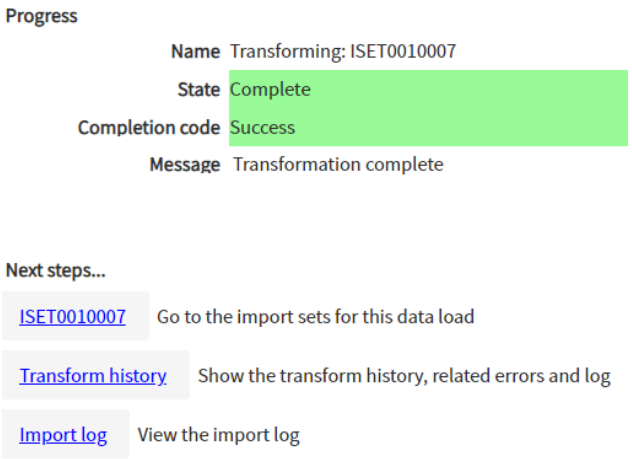
v. When the page reloads, review the generated Field Maps in the Related List. In this list, make sure there are 2 Field Maps , For Session and Number, and set Coalesce to true to Number. If there are additional Field Maps, delete them. In the end, the list should look like this (take careful look the red highlight):



vi. Afterwards, click on Transform and select the Map TeamViewer Task to Task and click on Transform:

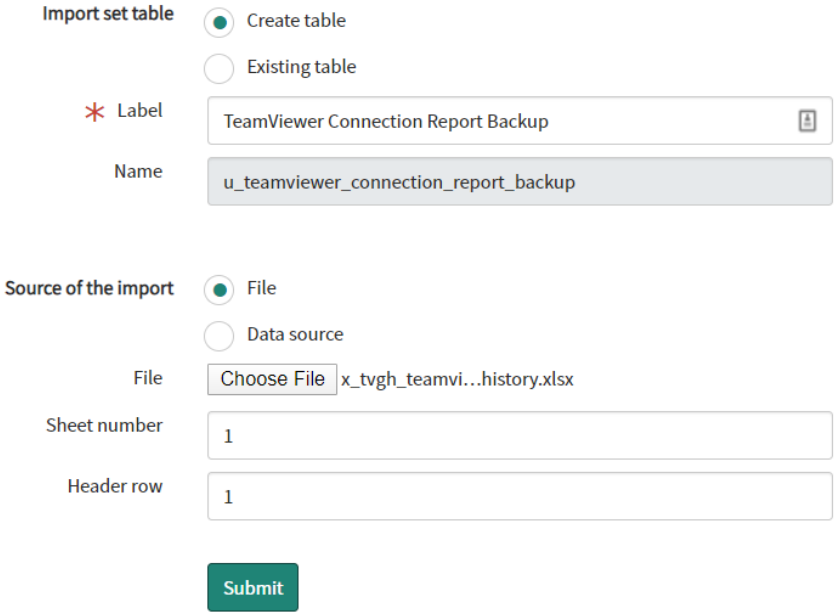


vii. Review your results. If successful, the import is complete as shown here:

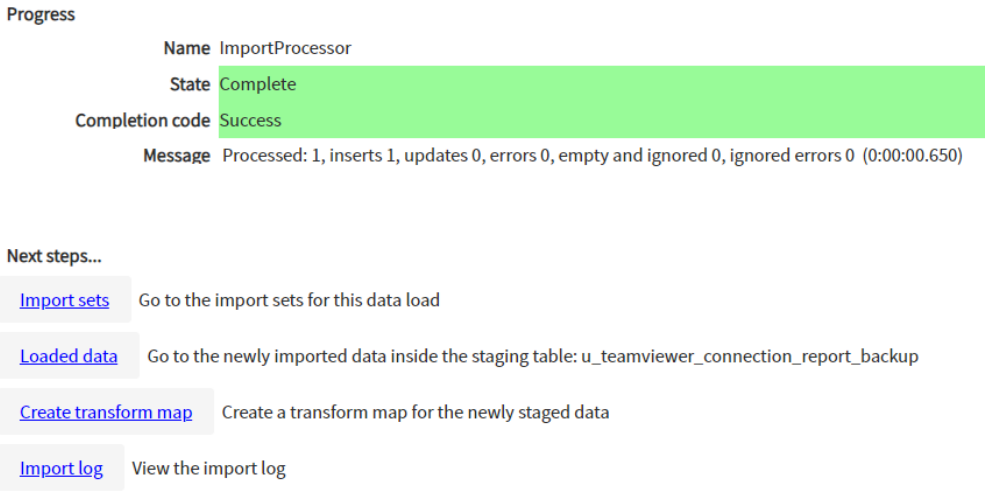


Please note: No new records shall be created in this import; only updates the Task records that had a reference to a Session with the appropriate reference in TeamViewer Enterprise

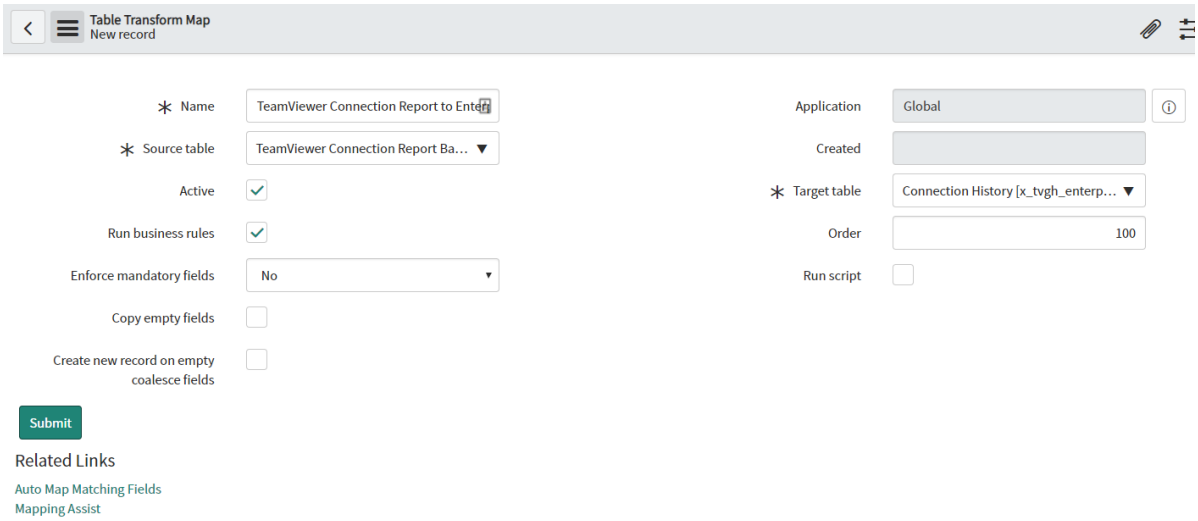
c. Import TeamViewer Connection Report Data from the backup Excel File created in Step 1.c.iii
   i. Go to module *System Import Sets -> Load Data* and create a new Import Set table called TeamViewer Connection Report Backup and upload the file from Step 1.c.iii. Afterwards click on Submit, as shown here:


Import set table
Create table
Existing table
Label
TeamViewer Connection Report Backup
Name
u_teamviewer_connection_report_backup
Source of the import
File
Data source
File
Choose File
x_tvgh_teamvi…history.xlsx
Sheet number
1
Header row
1
Submit

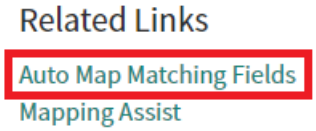
ii. After file is uploaded, click on Create transform map, as shown here:



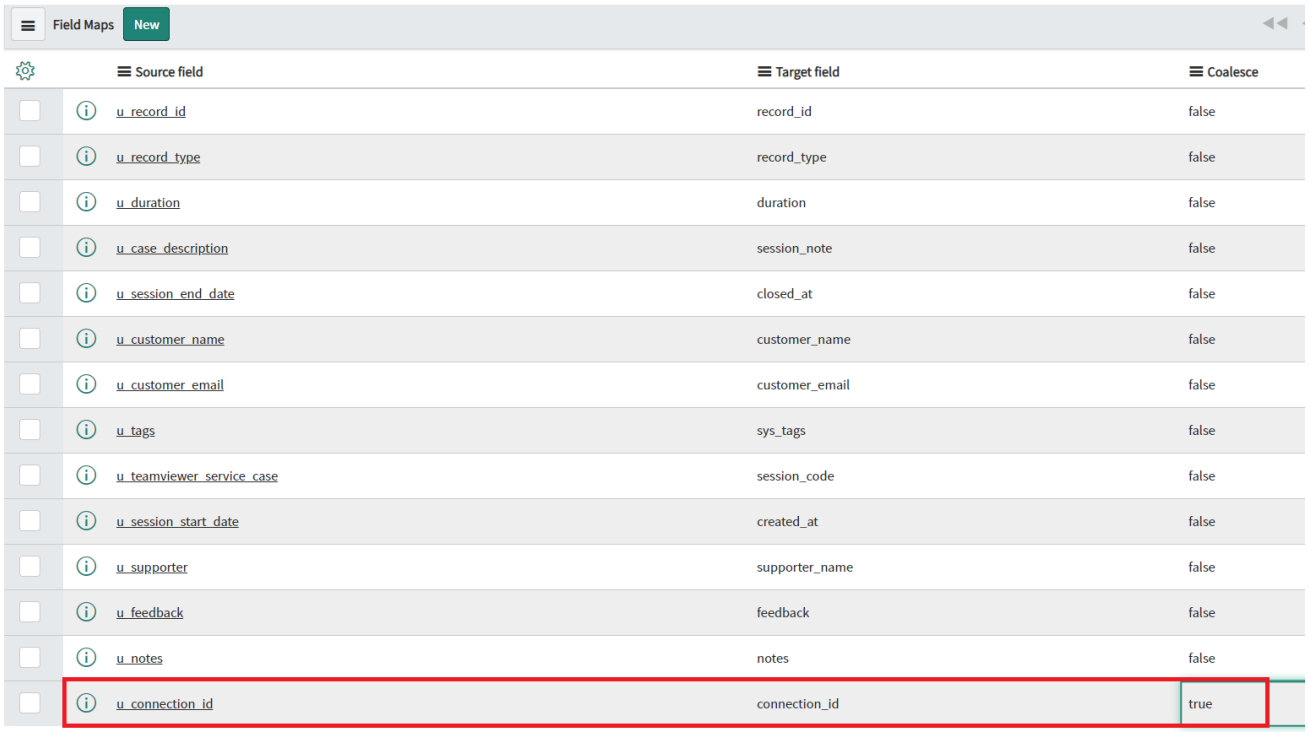
iii. Create the transform map in with the following configuration and Save on the record:



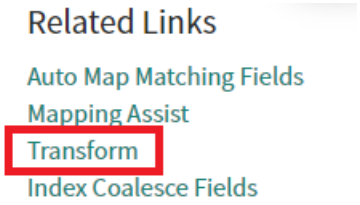
iv. Then on the form, click on Auto Map Matching Fields, in Related Links, to match the fields properly in the import process:

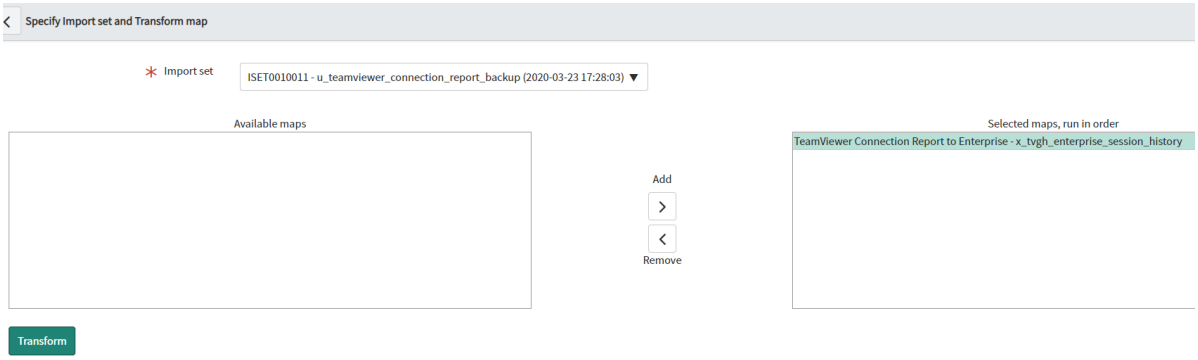


v. When the page reloads, review the generated Field Maps in the Related List. In this list, set Coalesce to true to Connection ID. In the end, the list should look like this (take careful look the red highlight):

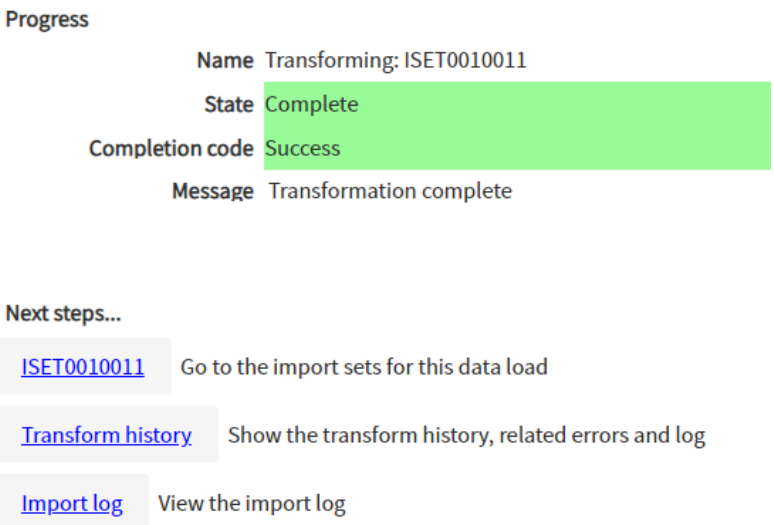


vi. Afterwards, click on Transform and select the Map TeamViewer Connection Report to Enterprise and click on Transform:

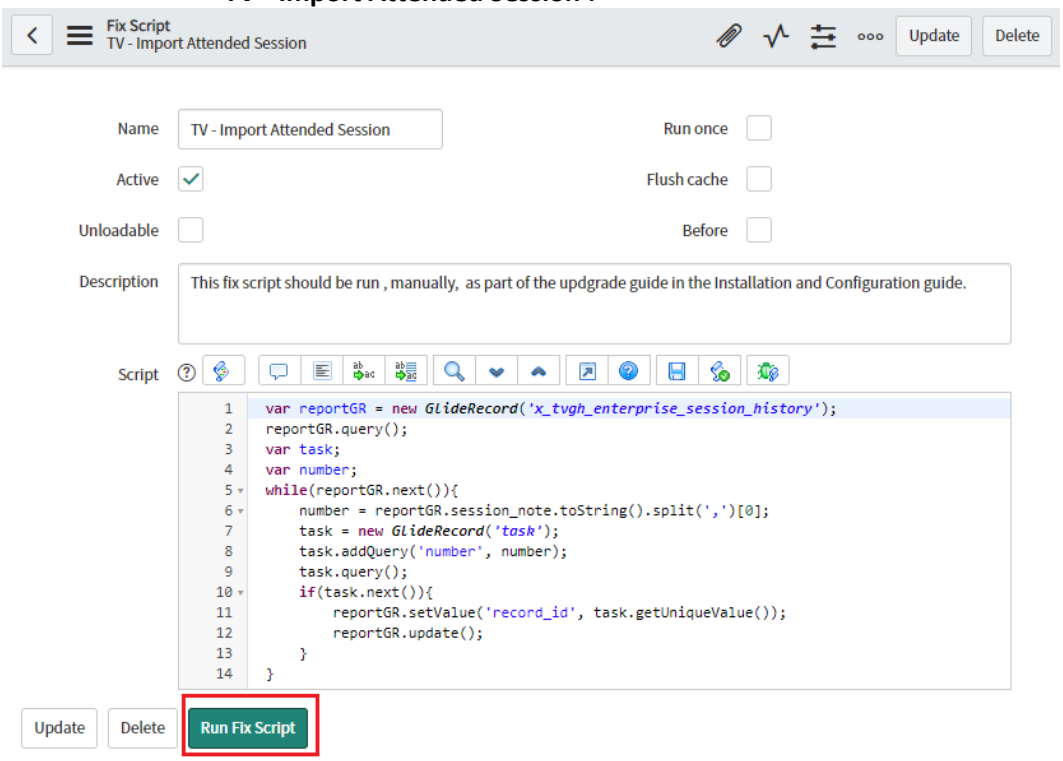




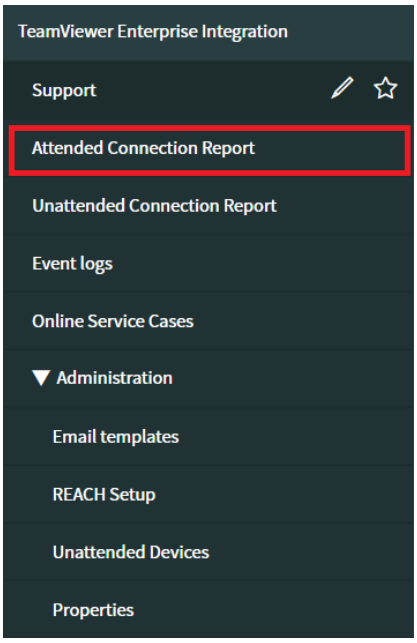
vii. Review your results. If successful, the import is complete as shown here:



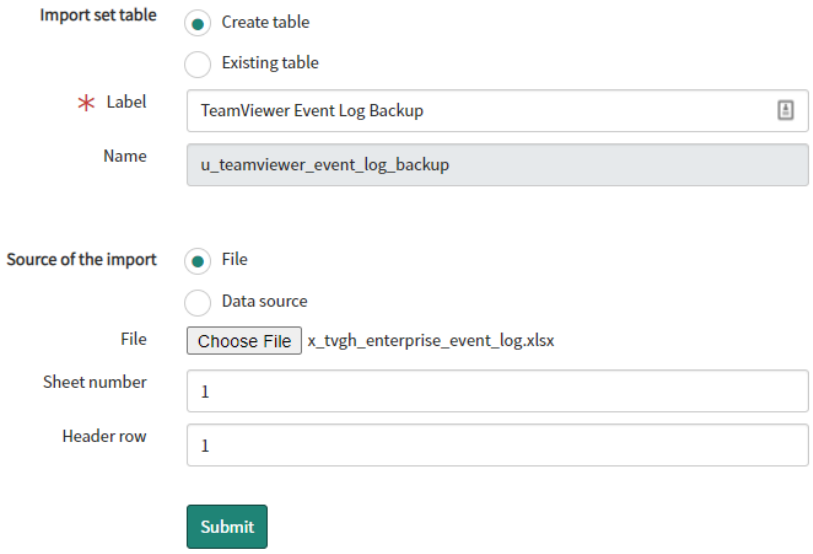
viii. Go to Module *System Definition* → *Fix Scripts* , open and run the Fix Script **TV - Import Attended Session :**



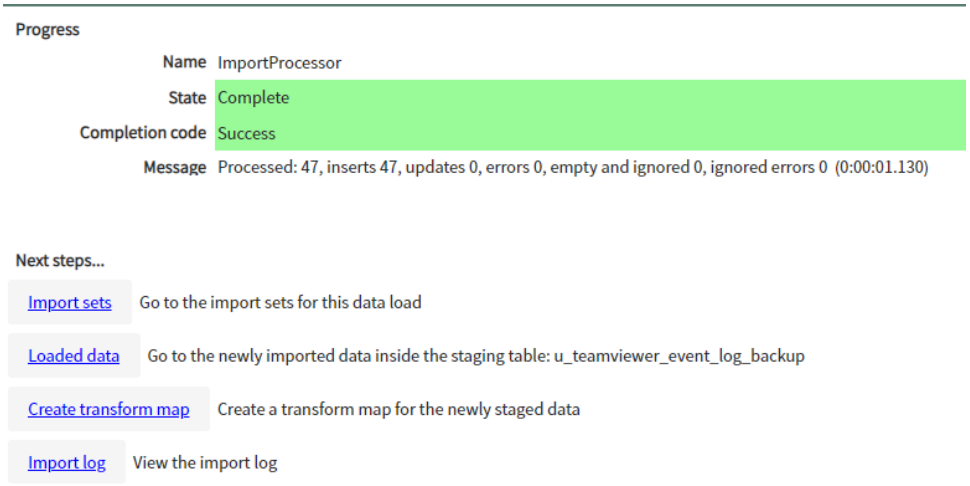
ix. The import is now complete for Attended Sessions. You can review the import data in module *TeamViewer Enterprise Integration* → *Attended Connection Report* :



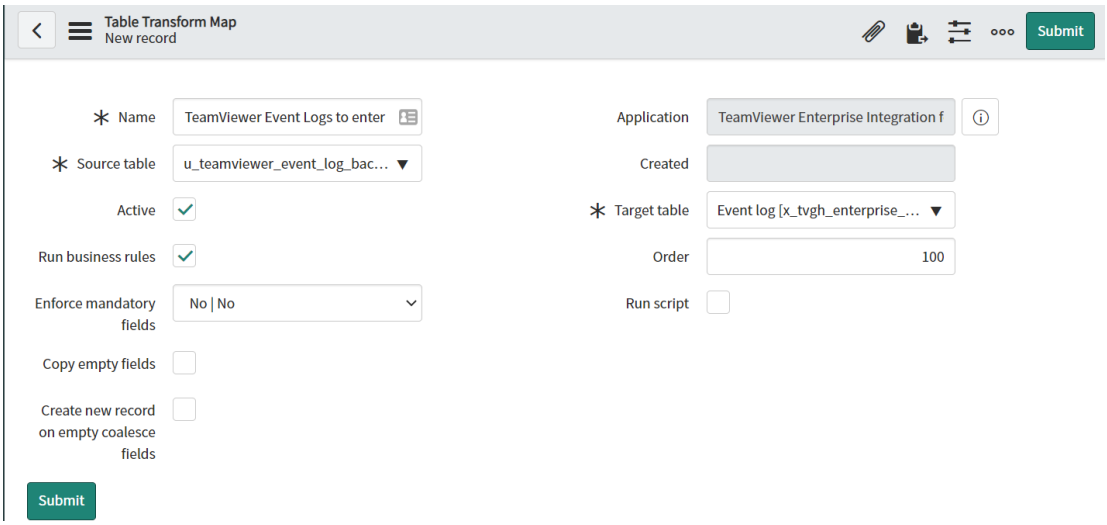
d. Import TeamViewer Event Log Data from the backup Excel File created in Step 1.d.iii
    i. Go to module *System Import Sets -> Load Data* and create a new Import Set table called TeamViewer Event Log Backup and upload the file from Step 1.d.iii. Afterwards click on Submit, as shown here:



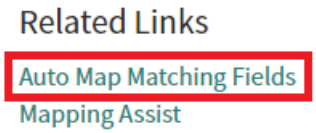
ii. After file is uploaded, click on Create transform map, as shown here:



iii. Create the transform map in with the following configuration and Save on the record:

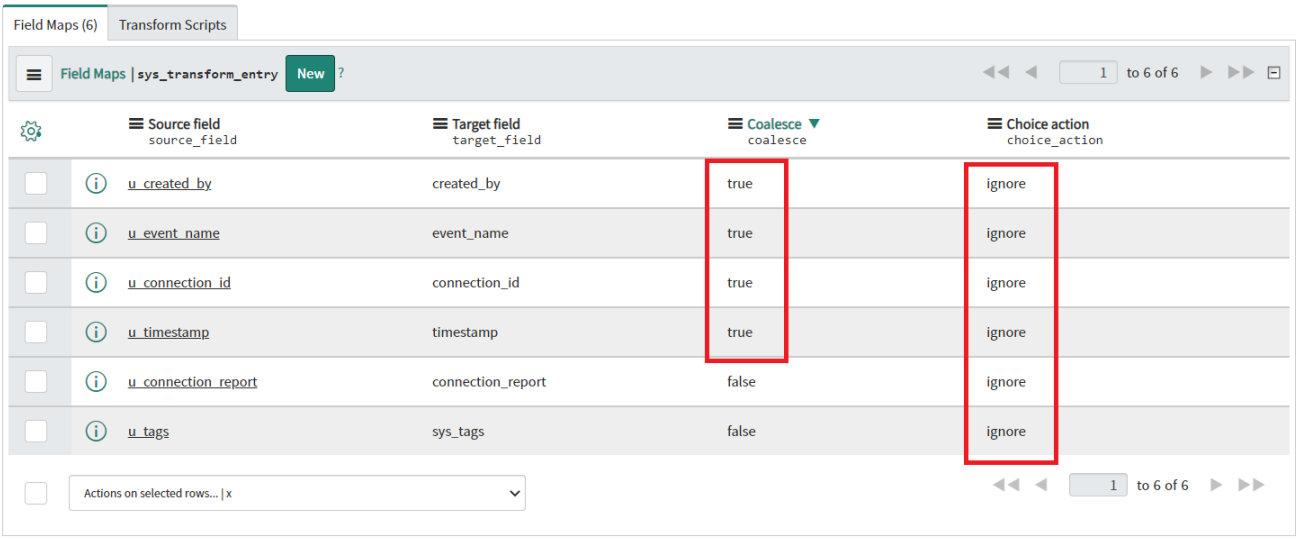


iv. Then on the form, click on Auto Map Matching Fields, in Related Links, to match the fields properly in the import process:

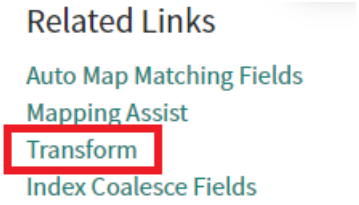


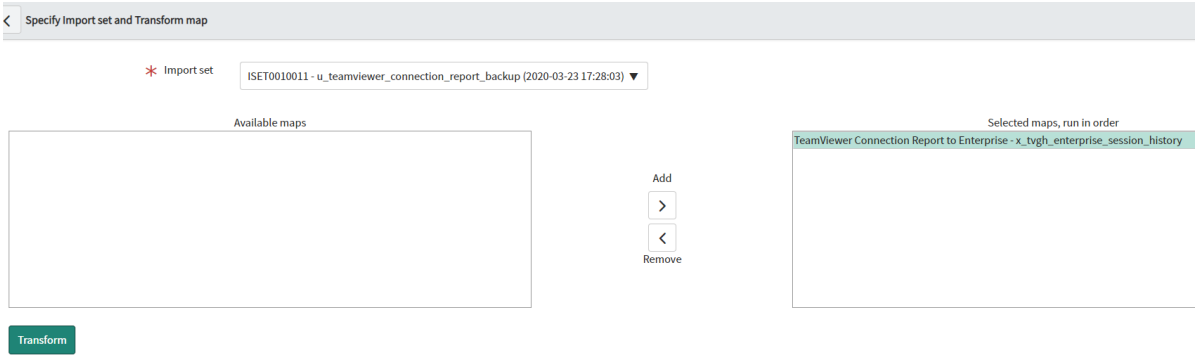
v. When the page reloads, review the generated Field Maps in the Related List. In this list, set Coalesce to true to the fields Created By, Event Name, Connection Id, and Timestamp. Also change the choice action for all

records to ignore. In the end, the list should look like this (take careful look the red highlight):

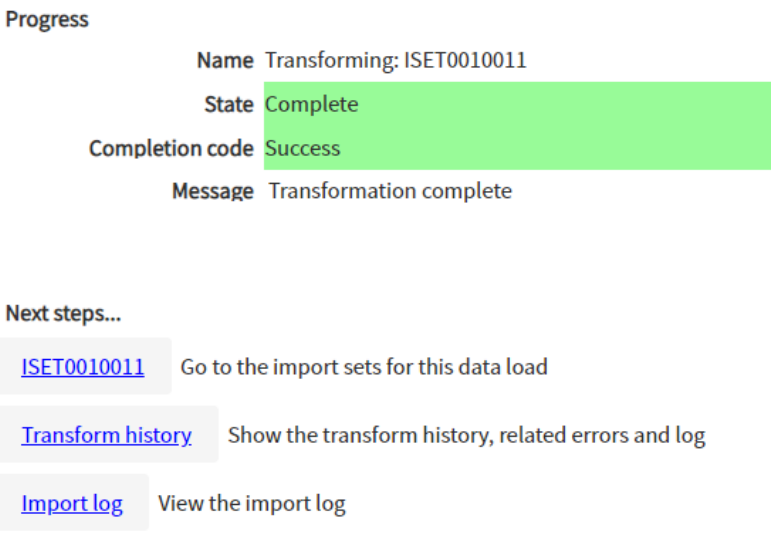


vi. Afterwards, click on Transform and select the Map TeamViewer Connection Report to Enterprise and click on Transform:

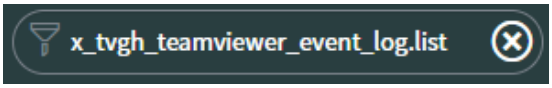




vii. Review your results. If successful, the import is complete as shown here:



viii. The import is now complete for Event Logs. You can review the import data by going to the filter navigator, and typing in **x_tvgh_teamviewer_event_log.list** and press enter:



Configuring the app for Service Operations Workspace (Optional)

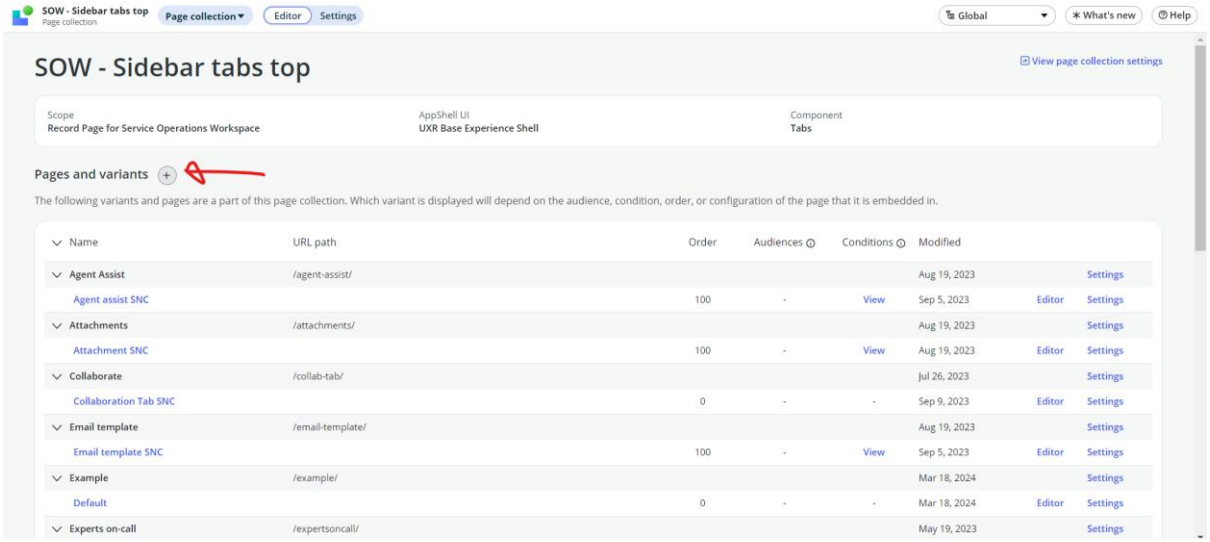
In order to configure Teamviewer Support for the Servicenow Service Operations Workspace please follow the steps below.

Please note that this is an optional configuration and not required to have the app running in oyur ServiceNow instance.

1.

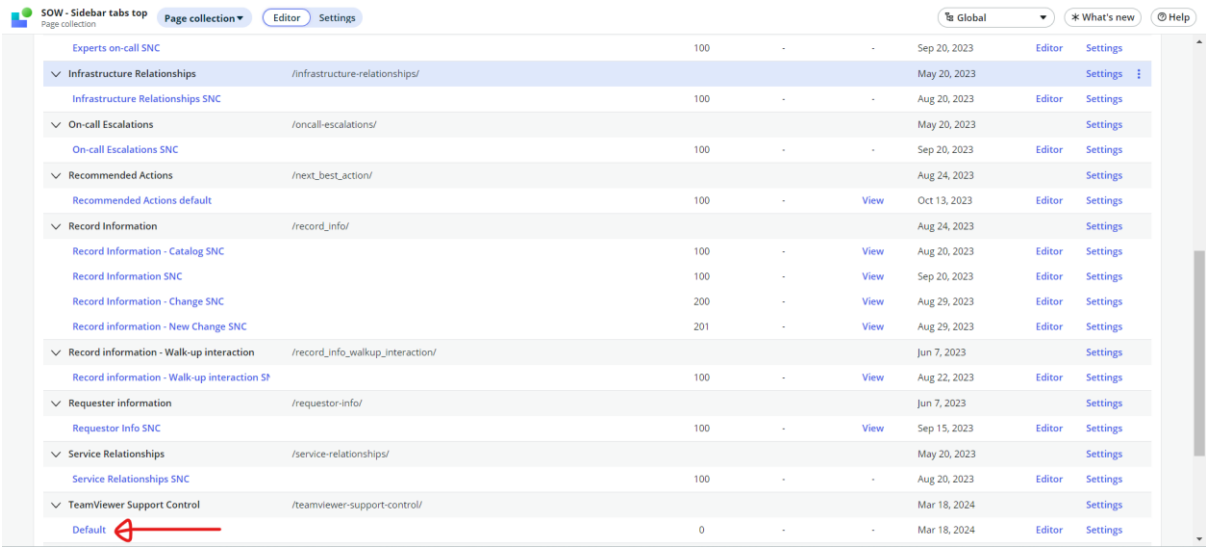
1. Make sure you are in the correct application scope to edit (eg: Global, TeamViewer, etc)
2. Go to page "/now/builder/ui/pc/728ec88c43fa2110f20fff53e9b8f278/"

3. Click + to create new page. This will create a new tab on the sidebar

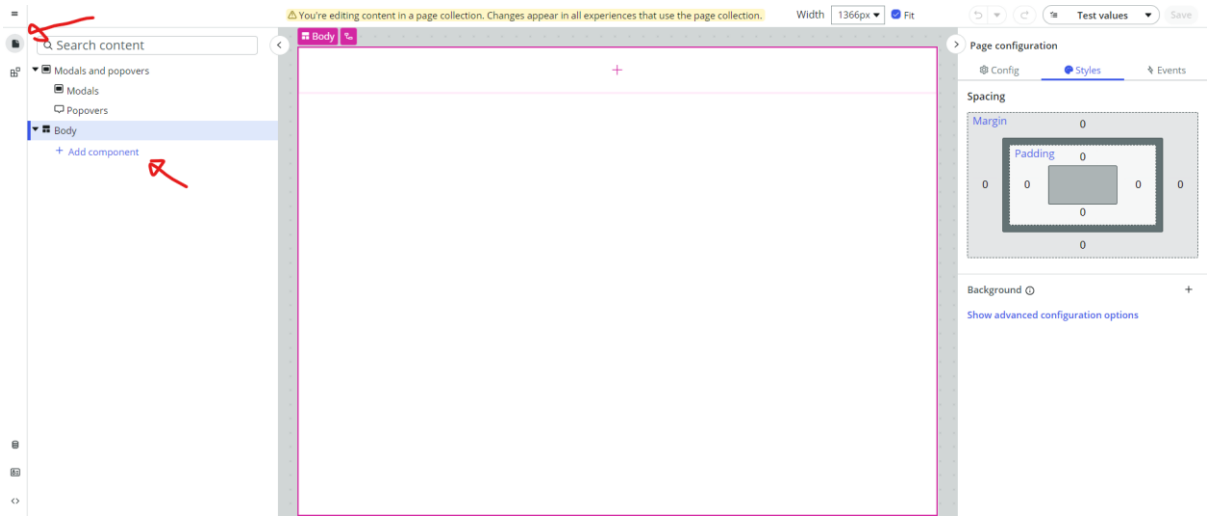


4. Call it "TeamViewer Support Control" and url path should automatically fill with "teamviewer-support-control"
5. Click continue, then create.
6. Depending on the version of UI builder you are using, you might get this pop-up to Open in editor:

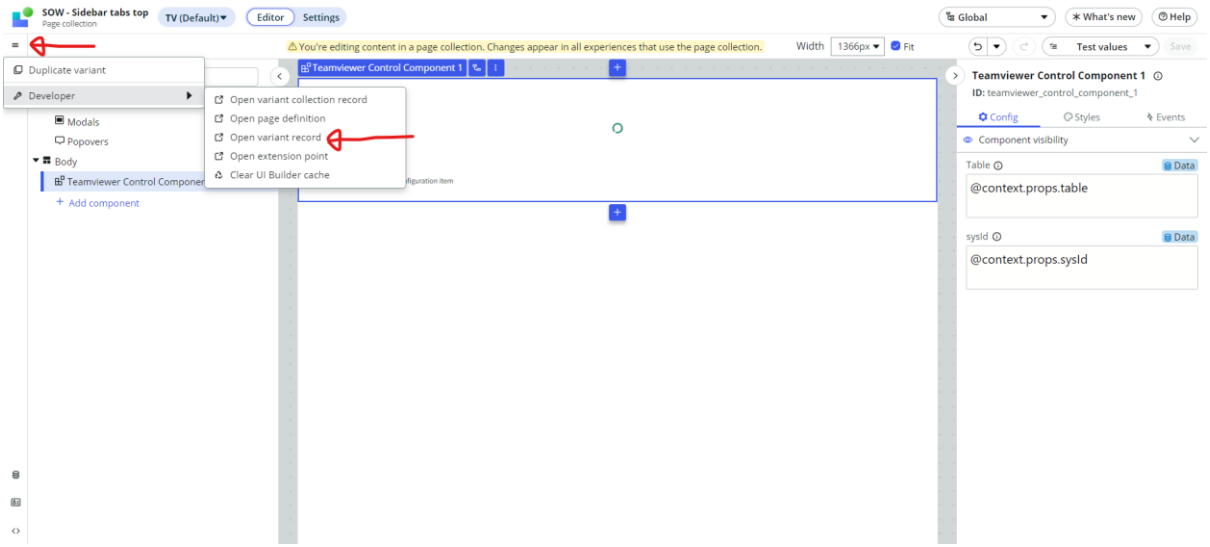
7. If not, look up in the list "TeamViewer Support Control", and click on its default.



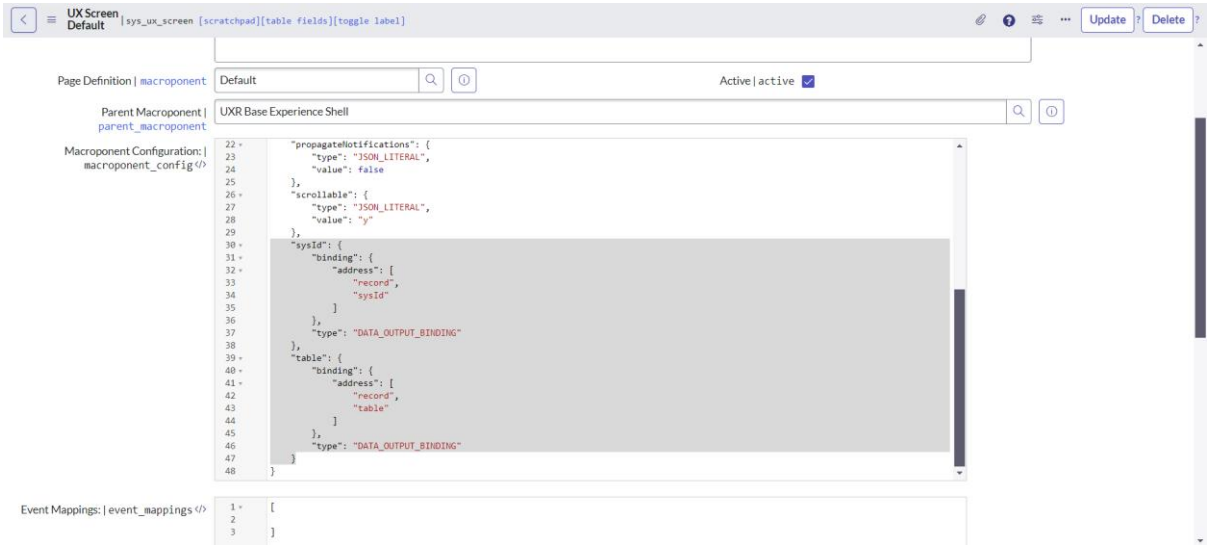
8. Click on "Add component" in the left hand side. If you are using a newer version you might see “Add content” instead.

9. 

10. In the top search bar, search for "Teamviewer Control Component" and select it
11. Click Save in the top right corner
12. Open the Variant Record

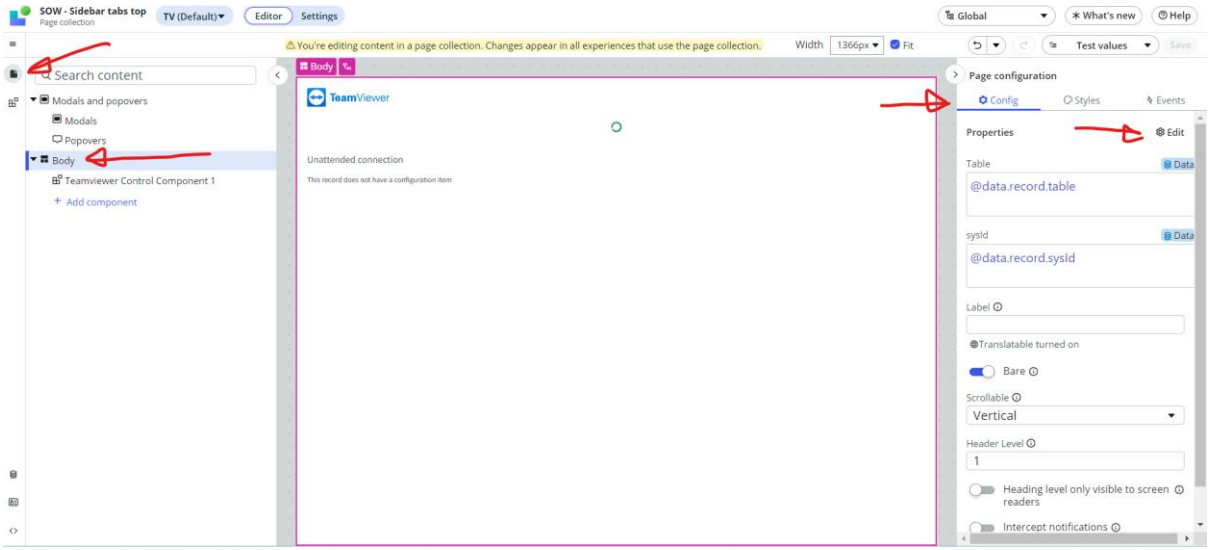


13. In the field “Macrocomponent Configuration”, add into the existing JSON object the following properties. Save after updating.

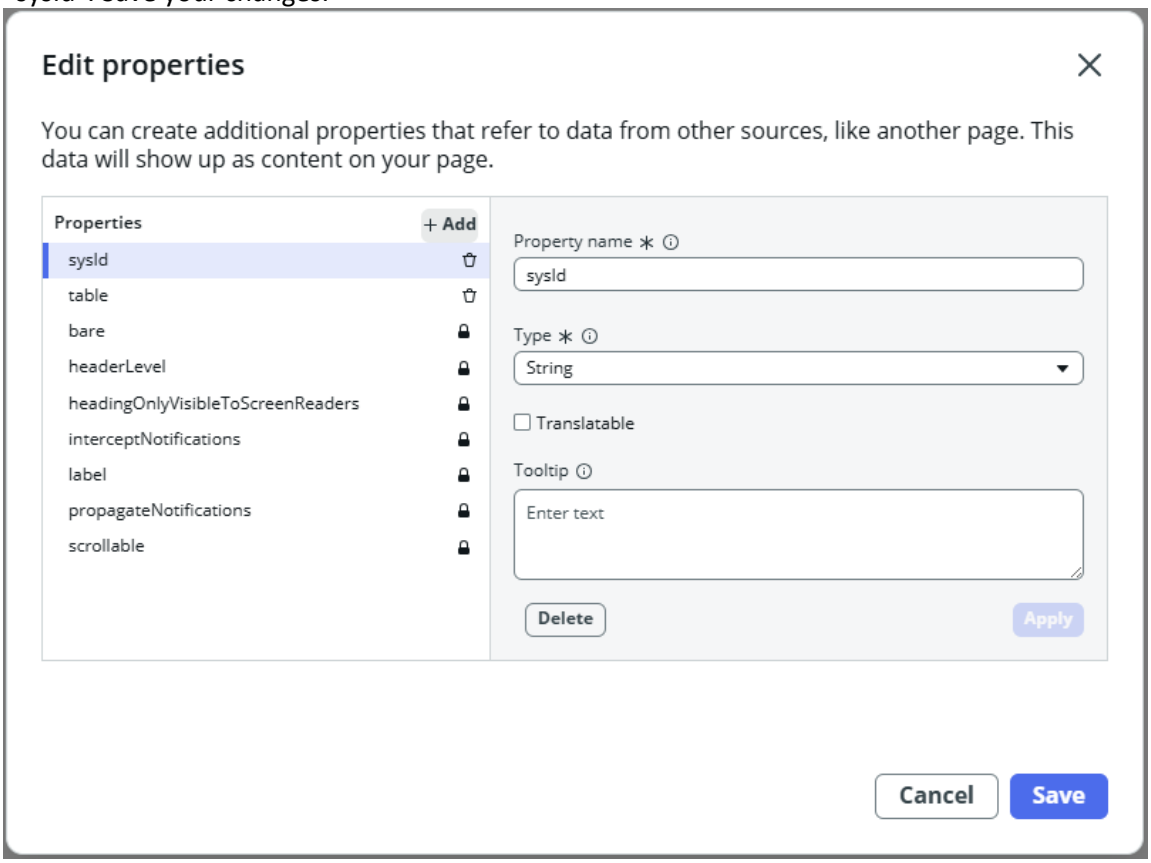



```
"sysId": {
    "binding": {
        "address": [
            "record",
            "sysId"
        ]
    },
    "type": "DATA_OUTPUT_BINDING"
},
"table": {
    "binding": {
        "address": [
            "record",
            "table"
        ]
    },
    "type": "DATA_OUTPUT_BINDING"
}
```

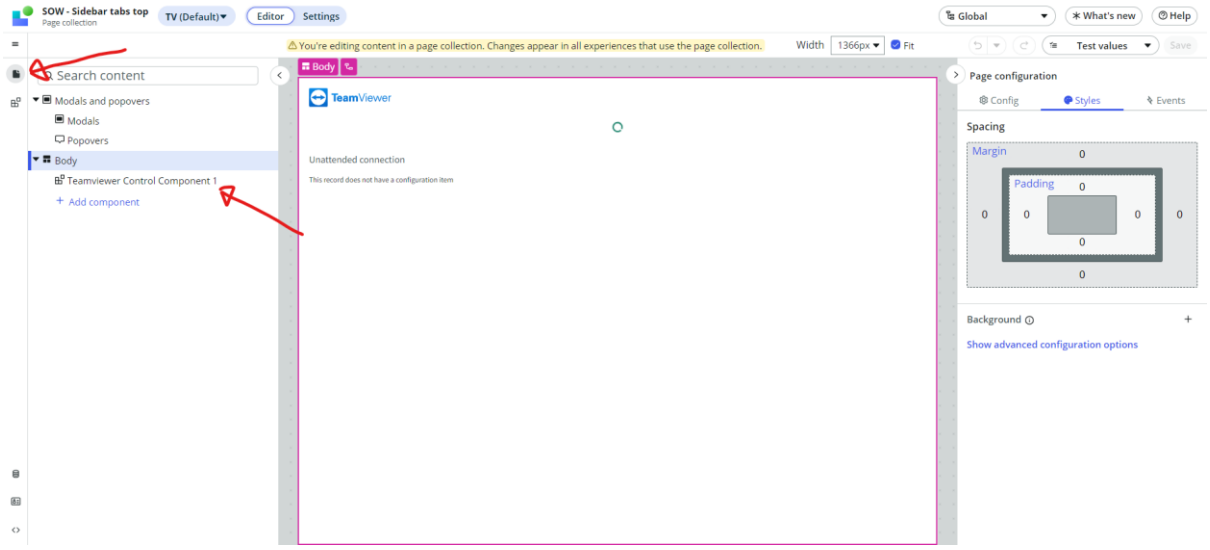
14. If there was no existing Macroponent configuration, paste the JSON above surrounded by “{}”
15. Go back to UI Builder, and in the sidebar click “Body”. Then go to the right side, make sure the tab “Config” is selected, and click on “Edit”



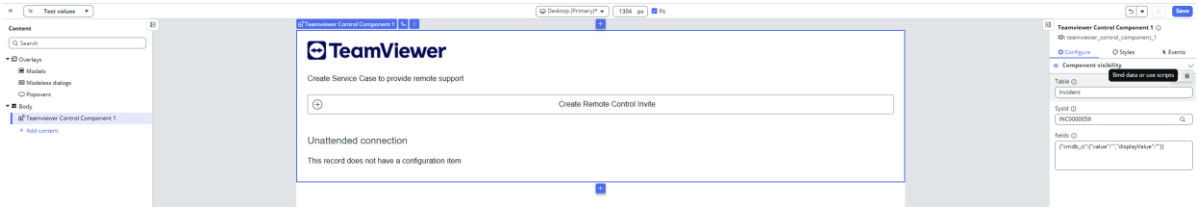
16. Now Click “Add” and Create two new properties, with the Property Names “table” and “sysId”. Save your changes.

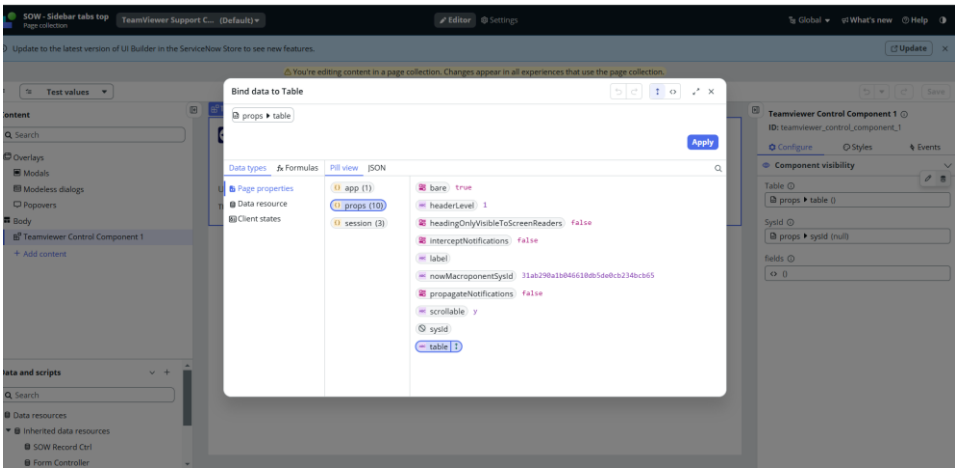


17.
18. Now click on the component instance “TeamViewer Control Component 1”



19. On the right side, select field type “Data” Binding, and for the value, set for Table: “@context.props.table” and for sysId: “@context.props.sysId”





20. After version 2.3.0 you will find a new property in the Teamviewer Control Component called “fields”. Please also use the data binding to set the value on this property as well, but this time choose “Use script” as shown in the screenshot below and replace the entire script with the following script:

```
/**
 * @param {params} params
 * @param {api} params.api
 * @param {TransformApiHelpers} params.helpers
 */
function evaluateProperty({
    api,
```

```
    helpers
}) {
    var fieldsObject = {
        cmdb_ci: {
            value: api.data.record.form.fields.cmdb_ci.value,
            displayValue: api.data.record.form.fields.cmdb_ci.displayValue
        }
    };
    return fieldsObject;
}
```

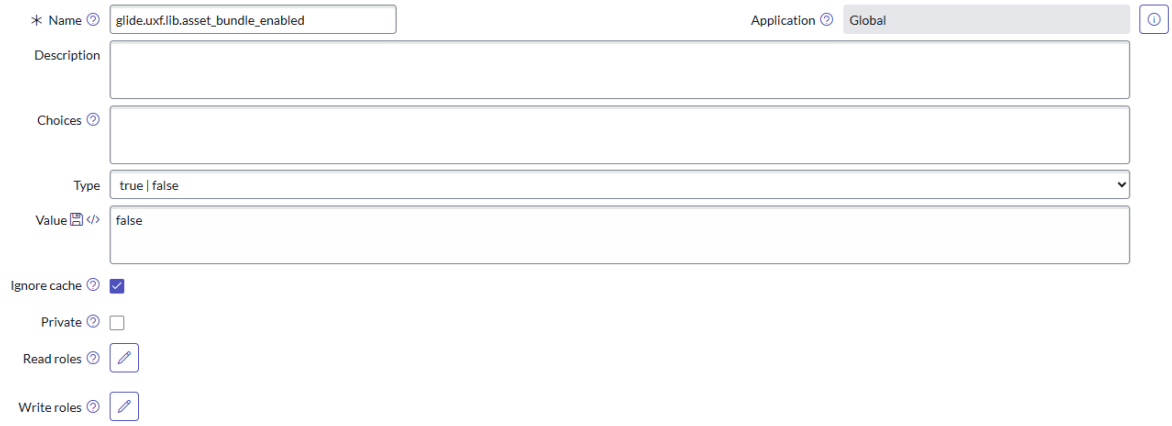
Note: This script is compatible with the incident table or any other table that stores the configuration item in the cmdb_ci field. Feel free to modify it if you want to take the values from a different source.

21. Click Save in the top right.

Known issue:

With the new release there are new libraries used in the TeamViewer Controls used in the Workspaces. There might be some incompatibilities with the instance where the pages don't load. This issue is directly from ServiceNow and unrelated to the TeamViewer application. To fix or avoid this, we recommend you to look for the system property "glide.uxf.lib.asset_bundle_enabled" and set it to "false". If your instance does not have this property, please set the scope to "Global" and create the property with the name

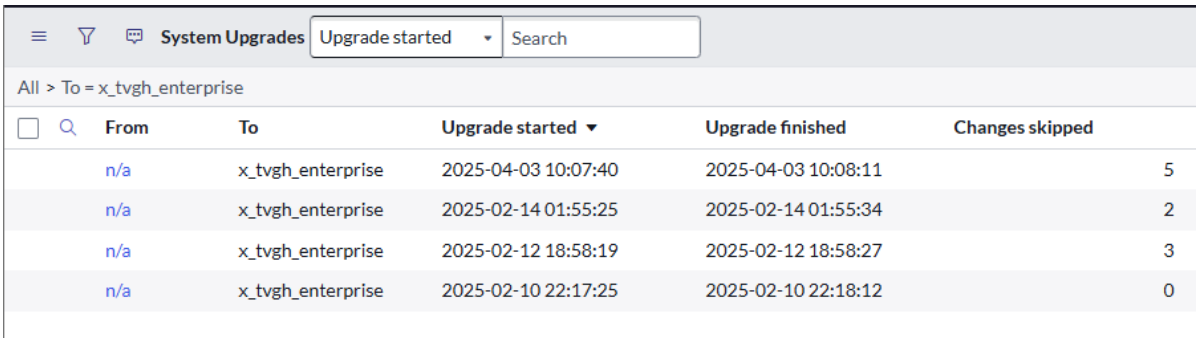
aforementioned, set the Type to “true | false” and the value to “false” as shown below:



*****IMPORTANT NOTICE*****

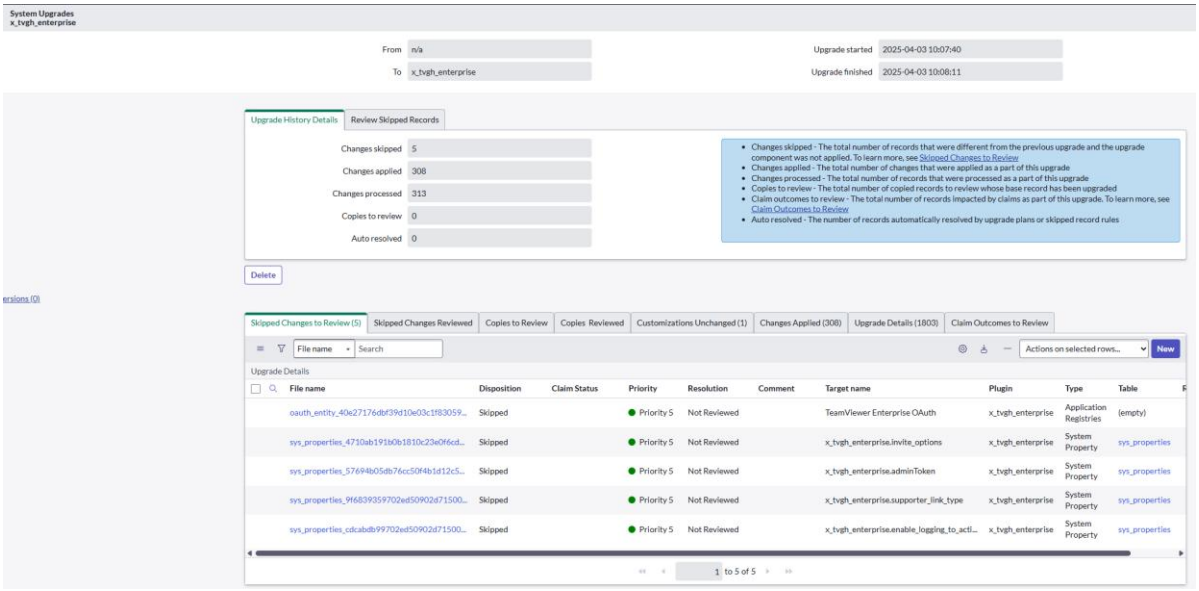
With this new release we are changing the application registry used for the OAuth authentication between ServiceNow and TeamViewer, ServiceNow will treat this as a “skipped change” when you upgrade the app. To avoid any issues please follow these steps:

1) Make sure your current scope is TeamViewer Enterprise Integration for ServiceNow
2) Go to the following link after you replace it with your instance name: “https://<instance_name>.service-now.com/sys_upgrade_history_list.do?sysparm_query=to_version%3Dx_tvgh_enterprise&sysparm_view=”
3) Make sure that you are sorting the list by “Upgrade Started” as shown in the screenshot below:

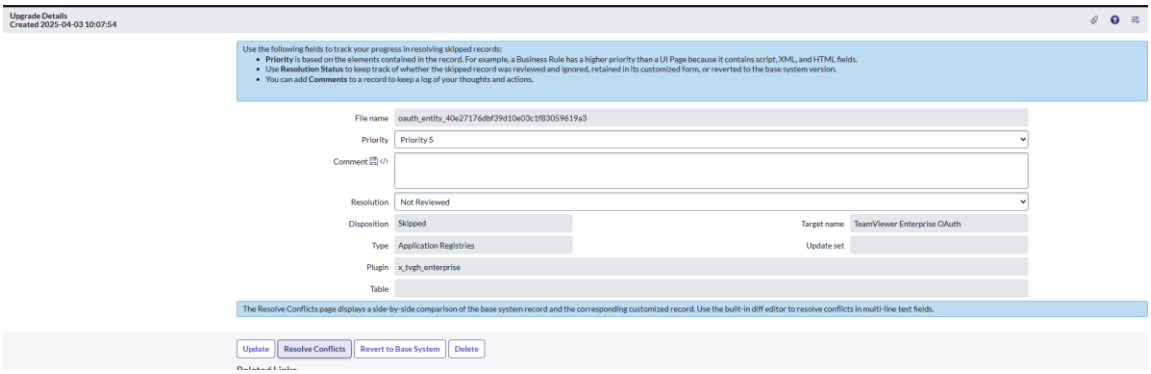


4) Open the first record, which is the one that came from your latest update; you can double check that by looking at the date of the Upgrade started column. You will see a screen

similar to the screenshot below



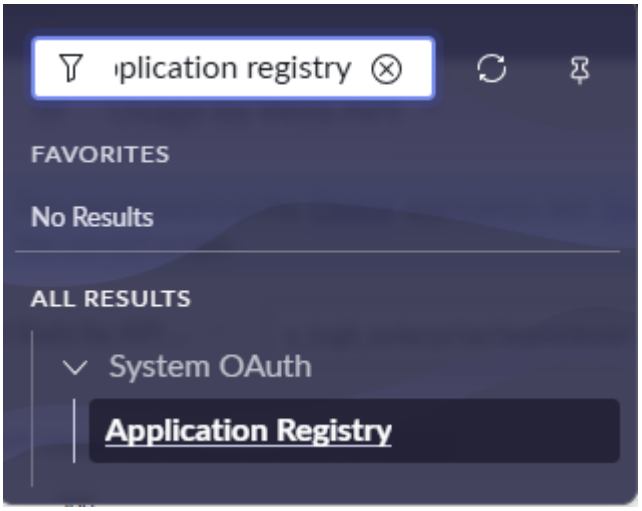
5) Open the record that shows “TeamViewer Enterprise OAuth” under the column “Target name” and click on Resolve Conflicts



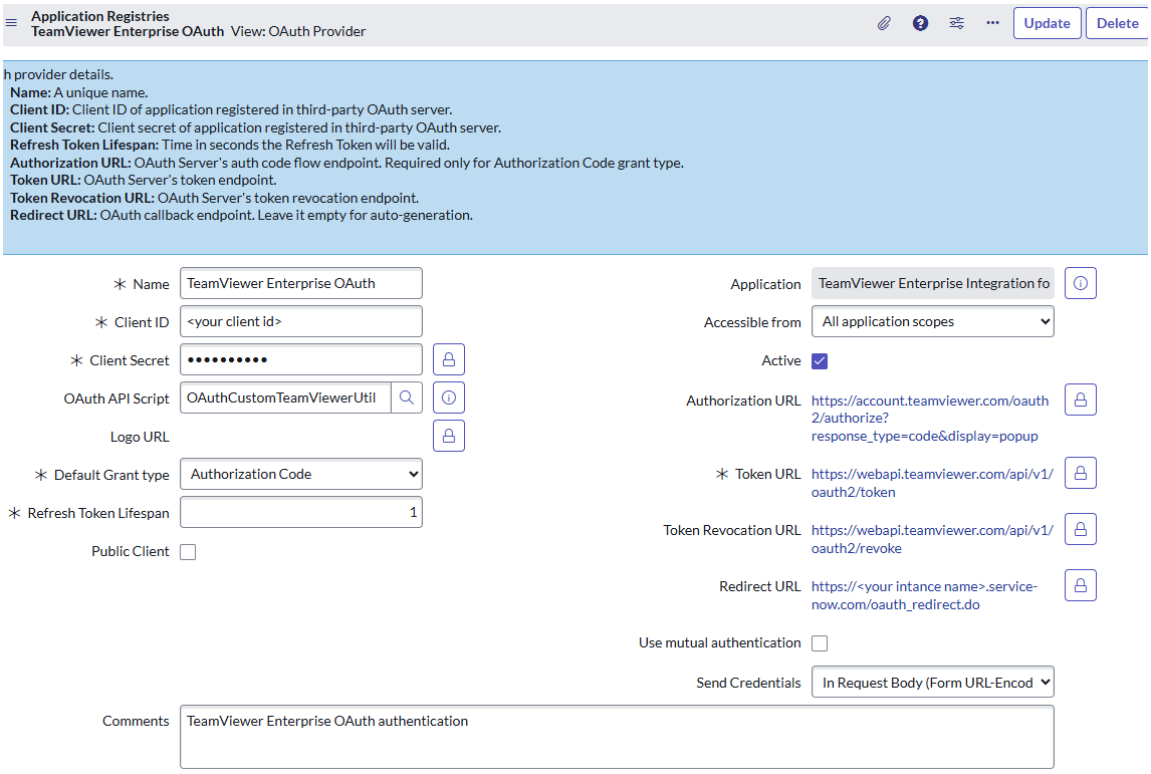
6) Then you can look for the rows with the label “Authorization URL”, and “OAuth API Script” and click on the arrow in the middle to apply the change from the “Base System”.

7) Finally, just click on Save Merge.
8) If you get an error when saving such as the one below

You can open a new ServiceNow tab and type in the filter navigator: ”Application registry”

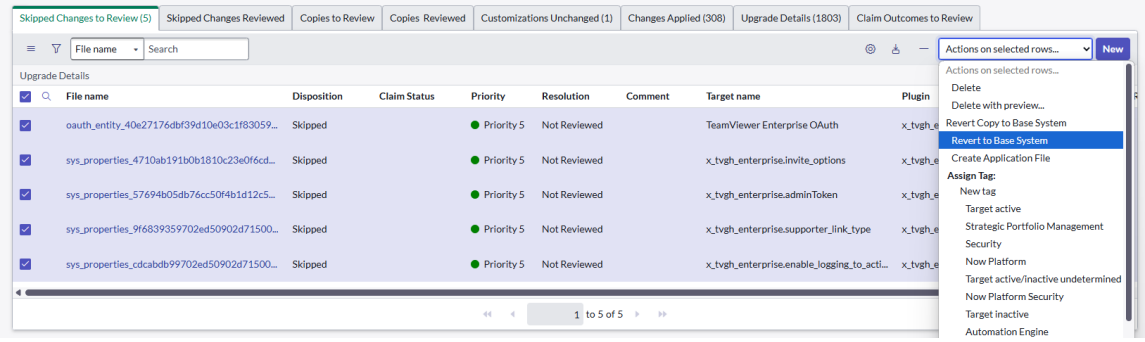


9) Then open the record “TeamViewer Enterprise OAuth” and update the fields “Authorization URL” and “OAuth API Script” with the values shown in the previous tab under the “Base system” column (left side). You should end up with a form such as the one below



10) It would be beneficial to make sure that the other skipped changes are not relevant. For example, in the screenshot from step 4, you can see that the other skipped changes are system properties. It makes sense that these are skipped since you customize these values on your instance. Those records can remain skipped. Any other record, especially scripts or similar configuration records, need to be “reverted to base system”. You can do this by clicking on the checkbox on the top left corner of the related list to select all records under the related list, and then on “Actions on selected rows” on the top right corner of the

related list as shown in the example below



11) Note that if you don't do this on records such as scripts or other configuration records, it might result in faults in the application behavior since it might try to execute things that are not present in it due to the skipped change.

END OF DOCUMENT