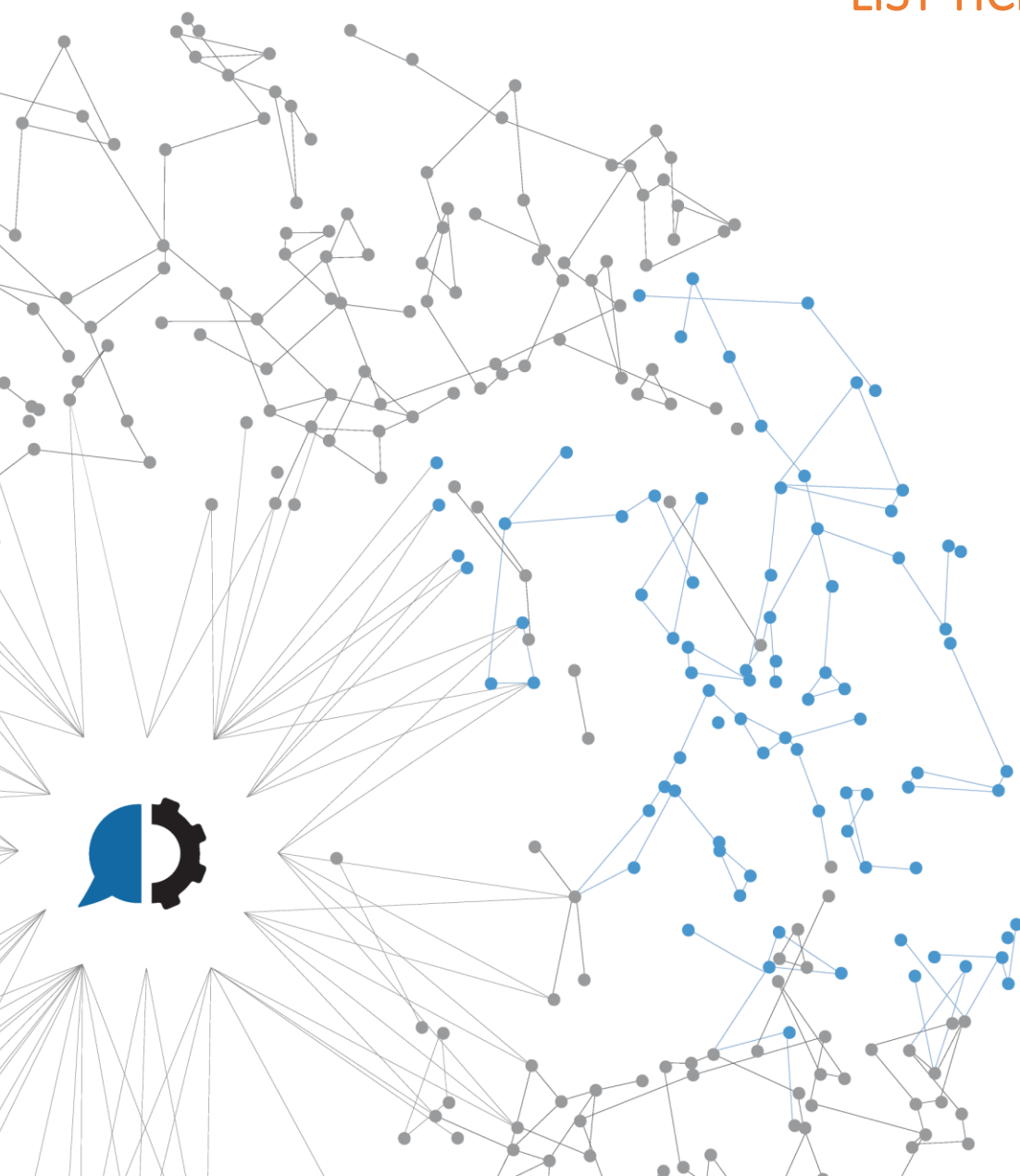




ZENDESK BOT

LIST TICKETS TO EXCEL





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OVERVIEW

This how to guide introduces the *Zendesk Bot - List Tickets to Excel*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate we can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being Automated are reports generation, file movement, data import and export, and scheduling batch processing.

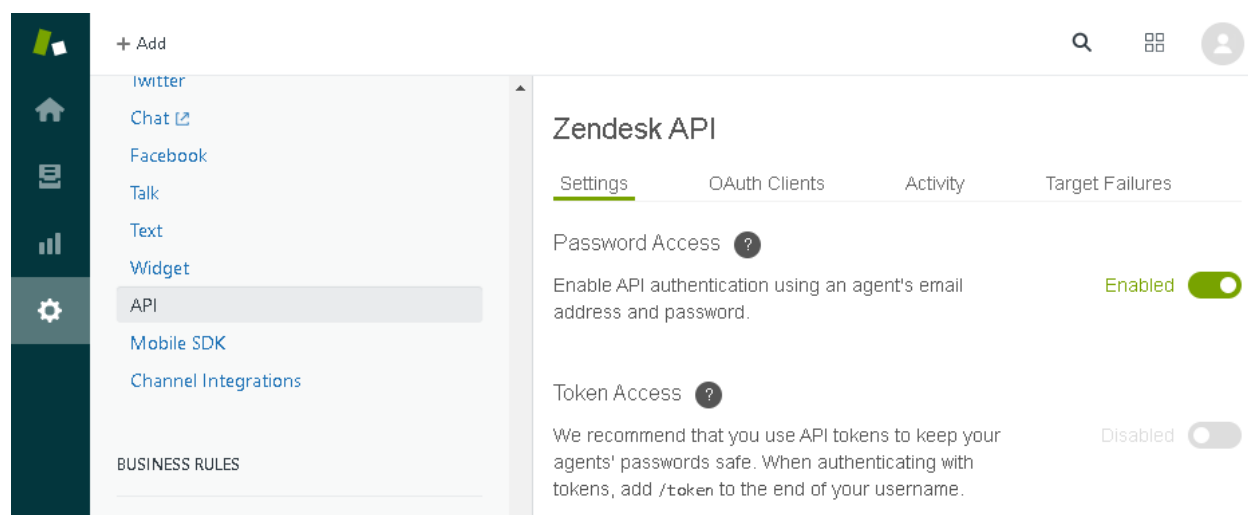
Zendesk Bot - List Tickets to Excel is based in the Zendesk v2 REST API. It executes a search API request in order to get the list of incidents based on the specification provided. The Excel output file will be automatically created with the next name pattern example: ZendeskTickets_27022020_123836 in the task folder.

You will find the possible configuration in the [HOW TO EXECUTE THE ZENDESK BOT - LIST TICKETS TO EXCEL](#) section.



PREREQUISITES

- **Automate:** The ZENDESK BOT depends on Automate software in order to work. The minimal supported versions are:
 - [Automate Ultimate 11.2](#)
 - [Automate Plus 11.2](#)
 - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our Zendesk BOT task
- **Zendesk:** Our minimal requirements are
 - **Zendesk REST API – Enabled:** You can check the Zendesk documentation in this [link](#). This bot uses Basic Authentication. Make sure it is Enabled.



- **Service Now User account:** With the appropriate permissions to execute Zendesk Table API requests.
- **Automate constants to be created to set the Zendesk connection values:**
 - **const_ZendeskURL:** Zendesk URL for connection.
 - **const_ZendeskUserName:** Zendesk Login User Name.
 - **const_ZendeskUserPassword:** Zendesk Login User Password.

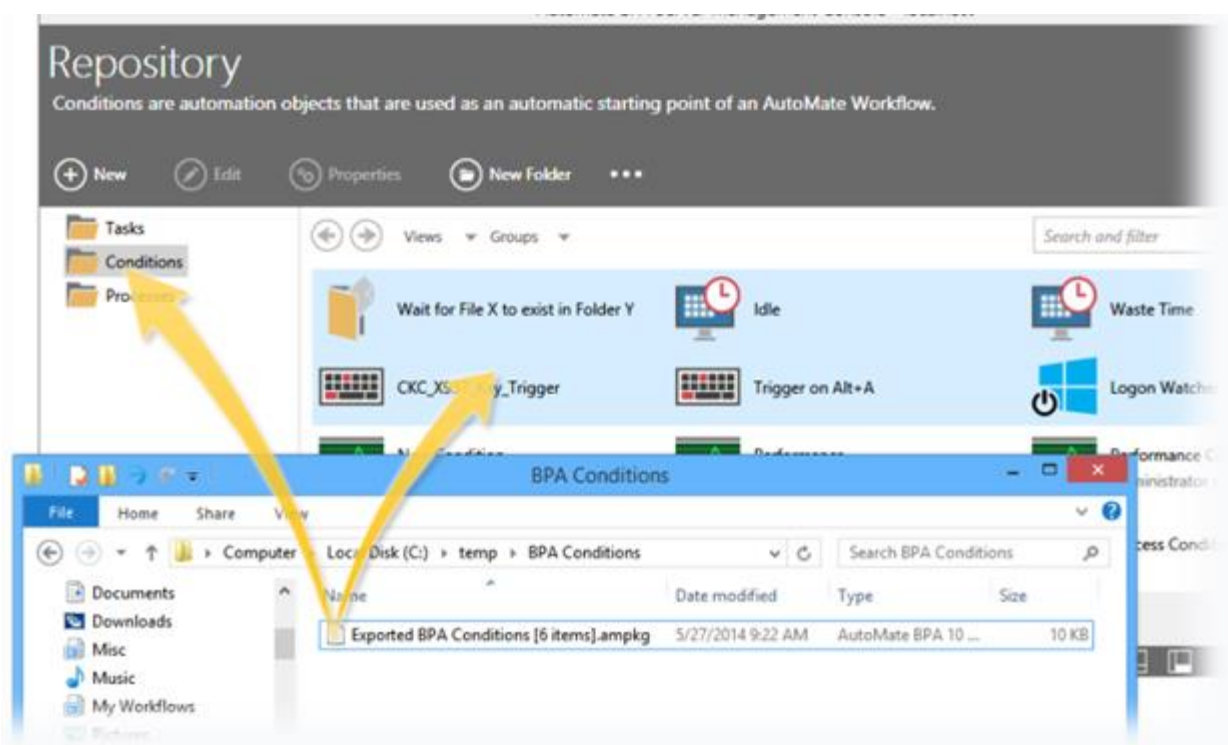


HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Server Management Console](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [SMC](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.



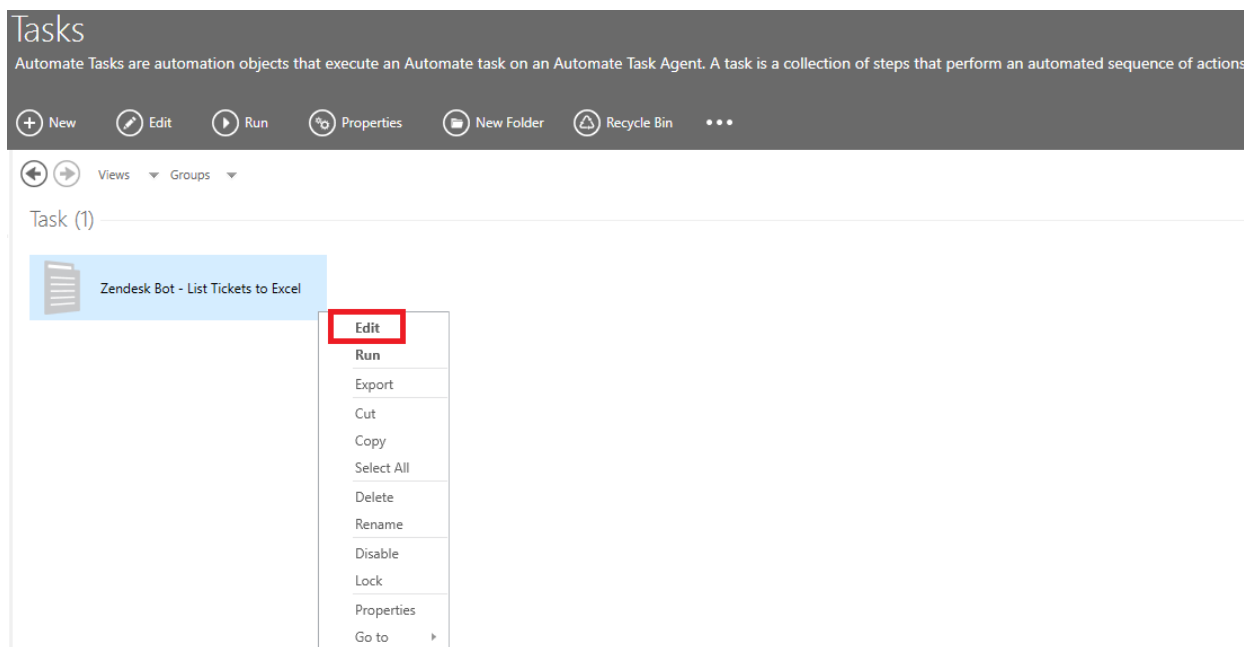


HOW TO EXECUTE THE ZENDESK BOT - LIST TICKETS TO EXCEL

If this is the first time running this task, we will need to set some parameters

Open the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



From [step 2](#) edit the next variables according to you desired output:

- [var_TicketStatus](#): Status of the incidents to be retrieve. Possible values include new, open, pending, hold, solved, or closed.
- [var_FromDaysBefore](#): From ticket posting date. Number of back days to calculate the FROM date for list generation.

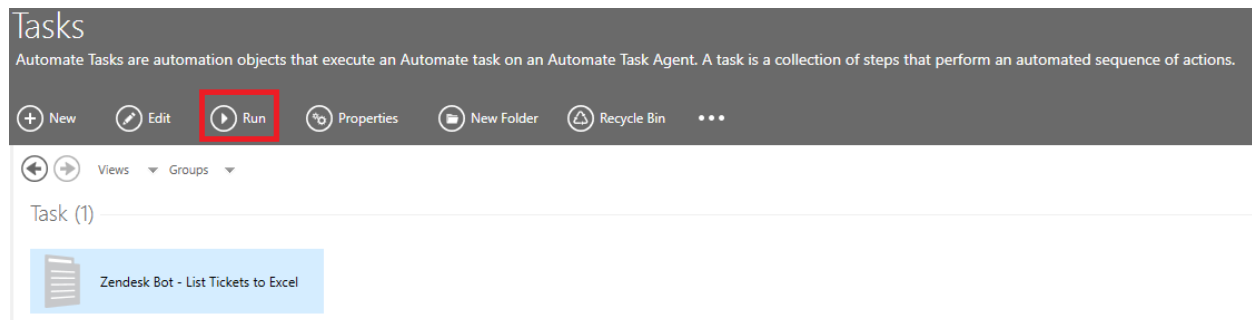
The output file will be automatically generated in the task folder with the next fields:

Id, status, subject, type, priority, created_at, updated_at, requester_id, submitter_id, assignee_id and description.

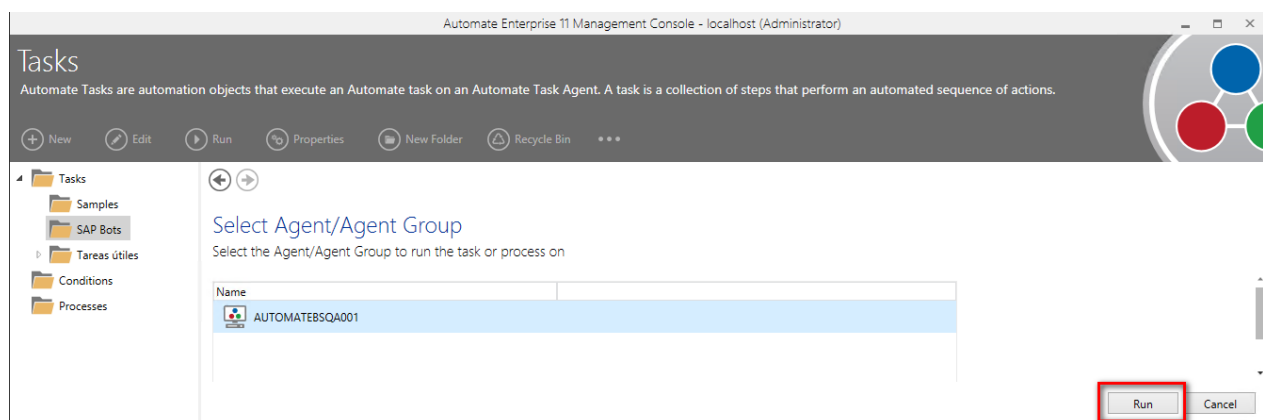
[Save and close](#) the task



Select the task and click on [Run](#)



Select your [Agent](#) and click on [Run](#) again





APPENDIX A – ZENDESK INCIDENTS VIEW AND EXCEL EXAMPLES

Zendesk Incidents view example:

Resulting Excel file:

	A	B	C	D	E	F	G	H	I	J	K
1	id	status	subject	type	priority	created_at	updated_at	requester_id	submitter_id	assignee_id	description
2	6	closed	Automate Test 2	incident	normal	2020-02-20T20:27:55Z	2020-02-21T14:01:16Z	403482806673	403482806673	403482806673	Automate Test 2
3	5	closed	Automate Test 1	incident	low	2020-02-20T20:27:33Z	2020-02-21T14:01:14Z	403482806673	403482806673	403482806673	Automate Test 1
4	4	closed	Automate Test 1	incident	low	2020-02-20T20:04:23Z	2020-02-21T14:01:12Z	403482806673	403482806673	403482806673	Automate Test 1
5	3	closed	Automate Test 1		low	2020-02-20T19:59:17Z	2020-02-21T14:01:10Z	403482806673	403482806673	403482806673	Automate Test 1
6	2	closed	test	incident	normal	2020-02-19T22:28:24Z	2020-02-25T15:01:43Z	403482806673	403482806673	403482806673	test

ZendeskTickets_27022020_123836.xlsx

File naming pattern:

ZendeskTickets

Base Name

ZendeskTickets

Represents the date of execution (ddMMyyyy)

123836

Represents the execution hour (Hmss)

Note: The output file will be created in the task folder: C:\Automate\Tasks\<<TASK NAME>>.



APPENDIX B - TROUBLESHOOTING

- Logs: Each iteration of our BOT creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Zendesk Bot - List Tickets to Excel*.



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and Automate processes, encrypt and secure data, and provide easy access to the information people