Autotask Integration User Guide

Arcserve UDP Cloud Direct

v6.2.2

arcserve

Legal Notice

Contact Arcserve Support

The Arcserve Support team offers a rich set of resources for resolving your technical issues and provides easy access to important product information.

Contact Support

With Arcserve Support:

- You can get in direct touch with the same library of information that is shared internally by our Arcserve Support experts. This site provides you with access to our knowledgebase (KB) documents. From here you easily search for and find the product-related KB articles that contains the field-tested solutions for many top issues and common problems.

- You can use our Live Chat link to instantly launch a real-time conversation between you and the Arcserve Support team. With Live Chat, you can get immediate answers to your concerns and questions, while still maintaining access to the product.

- You can participate in the Arcserve Support Global User Community to ask and answer questions, share tips and tricks, discuss the best practices and participate in conversations with your peers.

- You can open a support ticket. By opening a support ticket online, you can expect a callback from one of our experts in the product area you are inquiring about.

- You can access other helpful resources appropriate for your Arcserve Support product.

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Chapter 1: Introduction

The Arcserve UDP Cloud Direct integration with Autotask enables Arcserve partners to have their customer's Billable Usage, Backup Summaries, and Backup Events federated to the partners' Autotask environment.

- Billable Usage will be updated on a scheduled basis, concurrent to the partner's invoice date with Arcserve, ensuring that the customer usage in Autotask aligns with the usage on the partner's Arcserve invoice.

- Backup Summaries will be sent as Service Tickets for each partner's customer in Autotask once per day.

- Backup Events will be sent as Service Tickets for each partner's customer in Autotask at the conclusion of each backup job.

Chapter 2: How to Set up Autotask Integration

These steps are based on the Autotask hosted application at www.autotask.net.

Autotask ties API permissions to each user's configured security levels. To use the Arcserve/Autotask integration, you will need to either (1) use an existing user login with appropriate permissions, or (2) create a new user account with limited access.

In the event that you prefer to create a new user with appropriate security levels, perform the following steps:

Setting the Security Level with API Permissions

To set the security level with API permissions, follow these steps:

1. Log into Autotask.net with Admin-level permissions.

2. From the Autotask icon drop-down menu in the top left corner of the page, mouse over *ADMIN* and click the *Features & Settings* link.
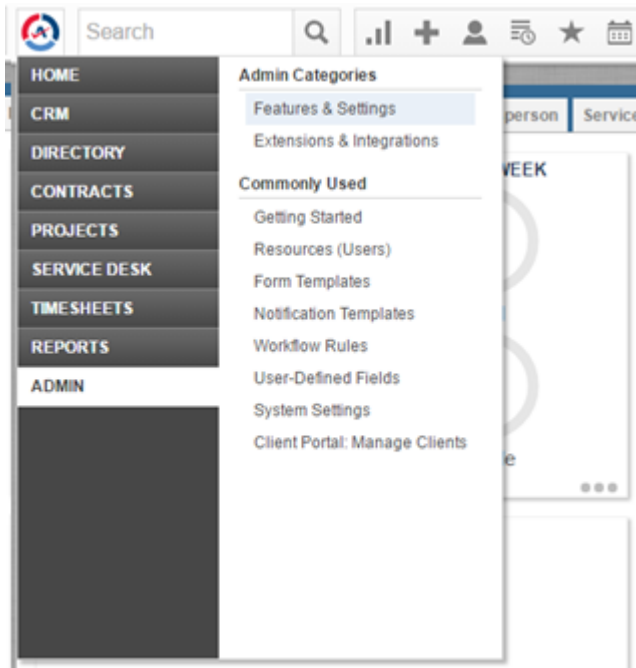
3. Click the *+* icon to expand the *RESOURCES/USERS (HR)* option.
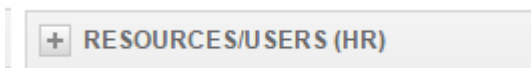
4. From the *Security* section, click on the *Security Levels* link.
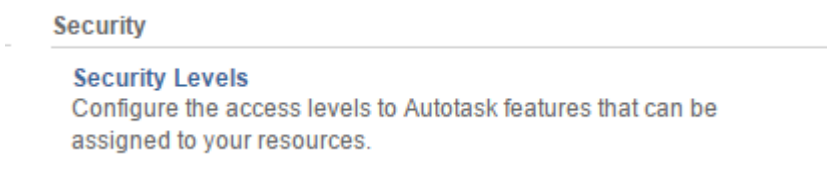
5. Choose the Security Level (for example, System Administrator) to which you want to add API permissions, and then click the pencil icon to the left of it to edit.

6. Scroll to the bottom of the window that opens, and click the + icon to expand the *OTHER* box.
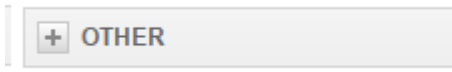
7. Scroll to the *Miscellaneous* section, and select the *Can login to Web Services API* check box.
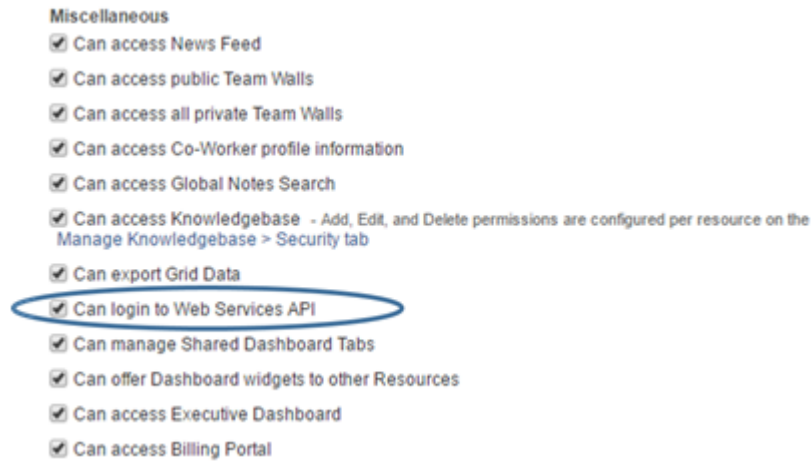
8. Click **Save & Close** at the top of the window.

You have set the security level with API permissions successfully.

Creating a User with API permissions

**To create a user with API permissions, follow these steps:**

1. Log into Autotask.net with Admin-level permissions.

2. From the Autotask icon drop-down menu in the top left corner of the page, mouse over *ADMIN* and click the *Resource (Users)* link.
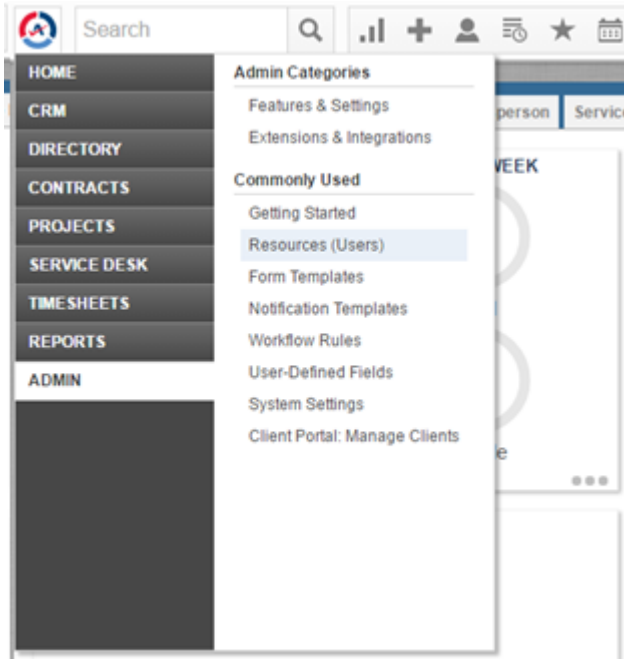
Note: If there is already an existing user that has the desired Security Level that you want to use for this integration, then skip to Linking Autotask and Arcserve step.

3. If you do not have an existing user, click the *+ New* button to create a new user.
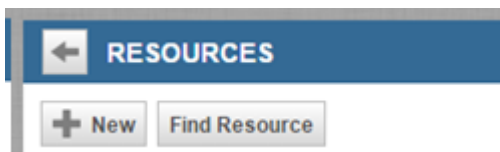
4. Fill out the General tab with First name, Last Name, and Email Address are required fields.

5. Click the *Security* tab.

6. Provide the following credentials in the *Security* tab.

- ◆ Username is populated by default (change if desired)

- ◆ Password, Confirm Password, and Security Level are required fields

- ◆ Select the Security Level for you which you granted Web Services API permissions. For more information, refer Setting the Security Level with API Permissions.

Note: Remember the full Username (including the "@<domain>.com") and Password.

7. Click the **Save & Close** button at the top of the window.

You have created a user with API permissions successfully.

Linking Autotask and Arcserve

Now that you have identified a user with appropriate API access, the integration is performed within the UDP Cloud Direct Portal.

Follow these steps:

1. Log into the UDP Cloud Direct Portal with UDP Cloud Direct Partner credentials.

2. Click the *PSA Integration* tab.

3. Click the *Autotask* tab.

PSA Integration

ConnectWise	Autotask

Credentials

Username

username@domain|com

Password

Test and Save

4. Enter the full Username and Password of the configured Autotask User into the Integrator Username and Password fields.

   Note: The username that is entered into UDP Cloud Direct Portal must be the complete email address, as entered into the Security Level tab when the user was created.

5. Click **Test and Save**.

   Upon a successful test, the page is updated with the Autotask integration data.

You have linked Autotask and Arcserve successfully.

Selecting Integration Options

You can select billing integration and/or alert integration.

Billing integration posts GB usage figures to your customers in Autotask. Those metrics can then be used to create Autotask invoices.

Alert integration allows you to configure tickets within Autotask when various events occur within UDP Cloud Direct. You can configure the integration such that tickets are opened in Autotask when specific job events occur, or you can simply choose to have the Daily Digest create a ticket once each day within Autotask.

Options

Billing

☐ Enable Billing

Alert Mapping

	Priority	Queue	Days Due
Success	High	Monitoring Alert	2
Warning	Medium	Monitoring Alert	1
Error	High	Monitoring Alert	3
Daily Digest	High	IT:Level I	

☑ Enable Daily Digest

Mapping your Autotask Customers to Arcserve Organizations

Finally, if Billing is enabled, map each Arcserve organization to an Autotask account, and select a contract and service.