NetEnrich
Integrations

Autotask Integration with NetEnrich Partner Portal

NetEnrich Services

This document specifies the steps to integrate NetEnrich Partner Portal and Autotask for a one-way integration of Assets and two-way integration of Tickets.

Document History and Change Log			
V0.1	Late 2010	Suman & Sreekanth	Two way integration for Tickets
V0.2	Feb 2012	Veena Palla	One way integration for Assets
V0.5	Mar 14, 2012	Veena Palla – Reviewed by Smita Kamat	1. Modified the contents, screen shots for Tickets integration same as in Assets integration and merged into a single document. 2. Created and included process flow diagram for Autotask.
V0.6	Feb 15, 2013	Veena Palla	Minor modifications

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Integration Checklist

Check list for VAR to complete Autotask integration:

☐	Create new Queue named **"NOC"** in Autotask.
☐	Create new statuses.
☐	Provide Autotask integration details in the Partner Portal.

1) Features & Benefits

The NetEnrich Partner Portal ("Partner Portal" or "Portal" hereafter) offers tight integration with Autotask. By linking together Portal and Autotask, users will be able to export discovered devices from the Portal to Autotask as Configuration Items. The full featured integration between NetEnrich Partner Portal and Autotask will provide the ability for

1. All managed devices in the Portal will be populated as Configuration Items (CI) in Autotask.
2. All tickets created in the portal will provide a reference to these CIs in Autotask. This provides a consolidated view of the incidents associated with the device.
3. Any changes (for e.g., unmanage a managed device) or updates made to devices in the portal will be updated to the CI in Autotask.

2) Configure Autotask Integration

2.1. Overview of the Integration Setup process

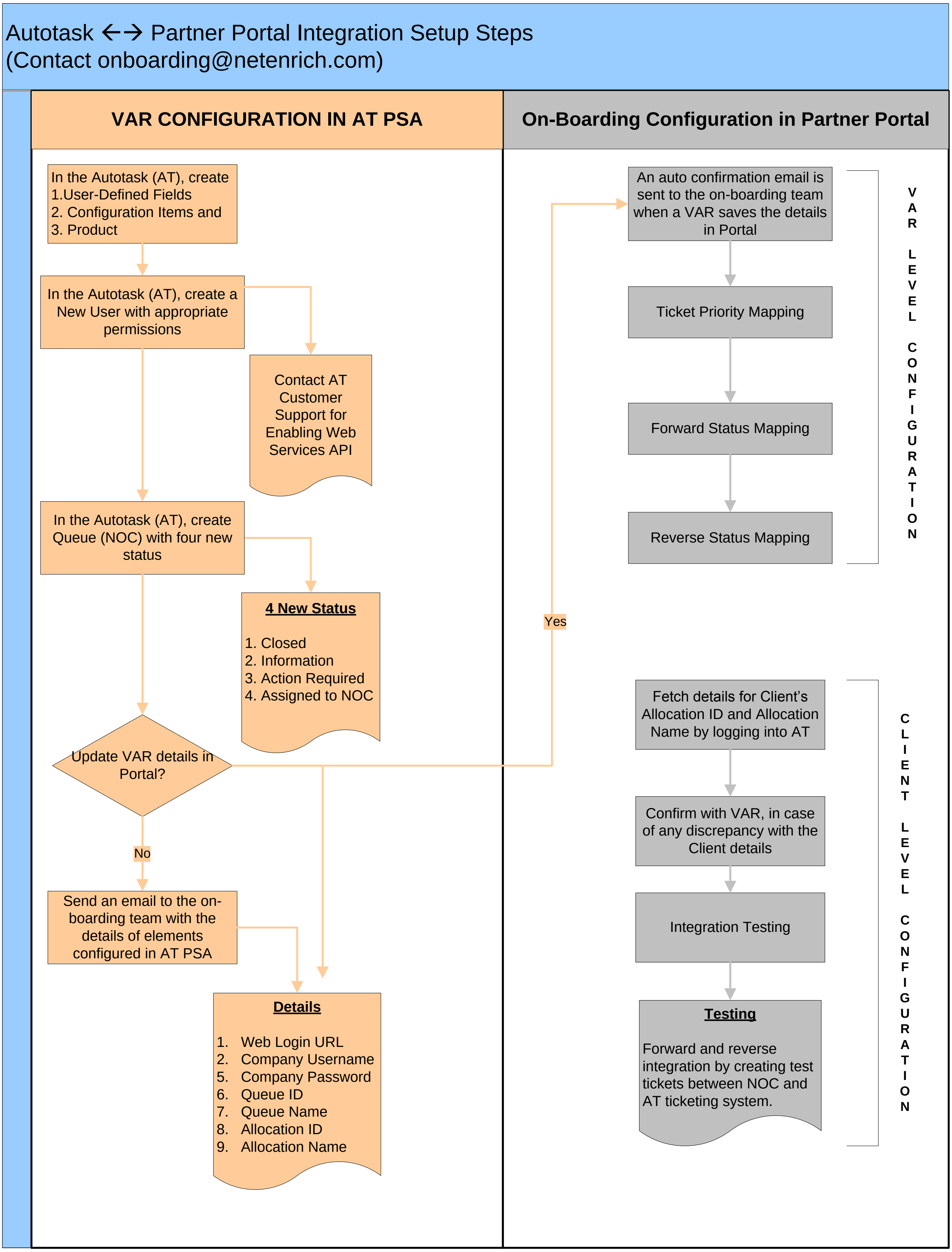


Figure 1 - Integration Setup Workflow

2.2. Configure a New User in Autotask

Autotask PSA administrators can assign permission to the new users. The PSA administrator must setup a master username and password and enable the web services API for the user. New users can be allowed access to all objects or just to the objects that they have created themselves.

When creating a new user, the email id should be configured under General tab in Autotask, as mspsupport@netenrich.com for the NOC member account and is shown in Figure 2. Any ticket updated or created in Autotask and is assigned to the NOC queue, an email is sent to the NOC support team at mspsupport@netenrich.com. Then this team begins to work on the ticket request.

For Autotask, these permissions are set from the Security tab under Employees/Resources and under the Admin tab as shown in Figure 3.

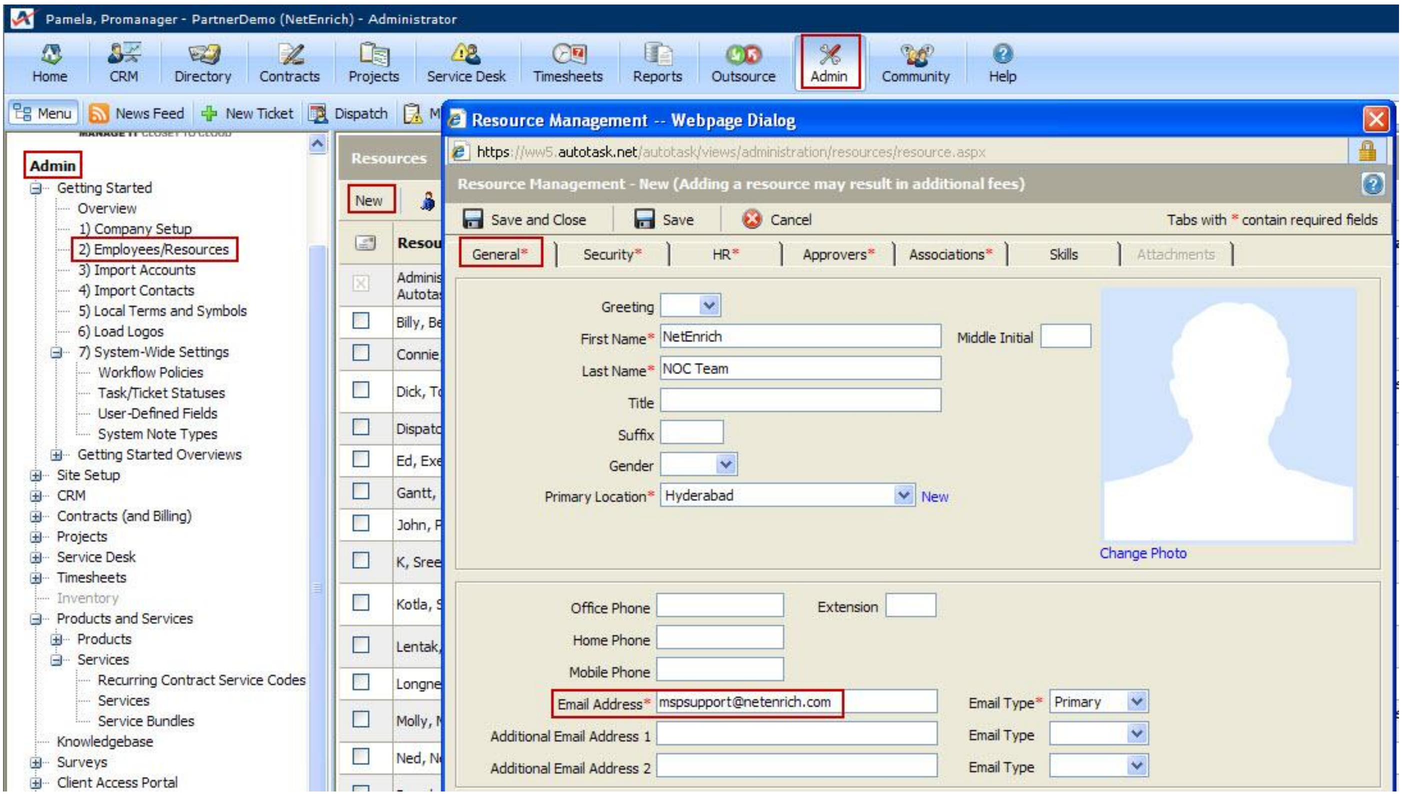


Figure 2 - Admin >> Create a New User

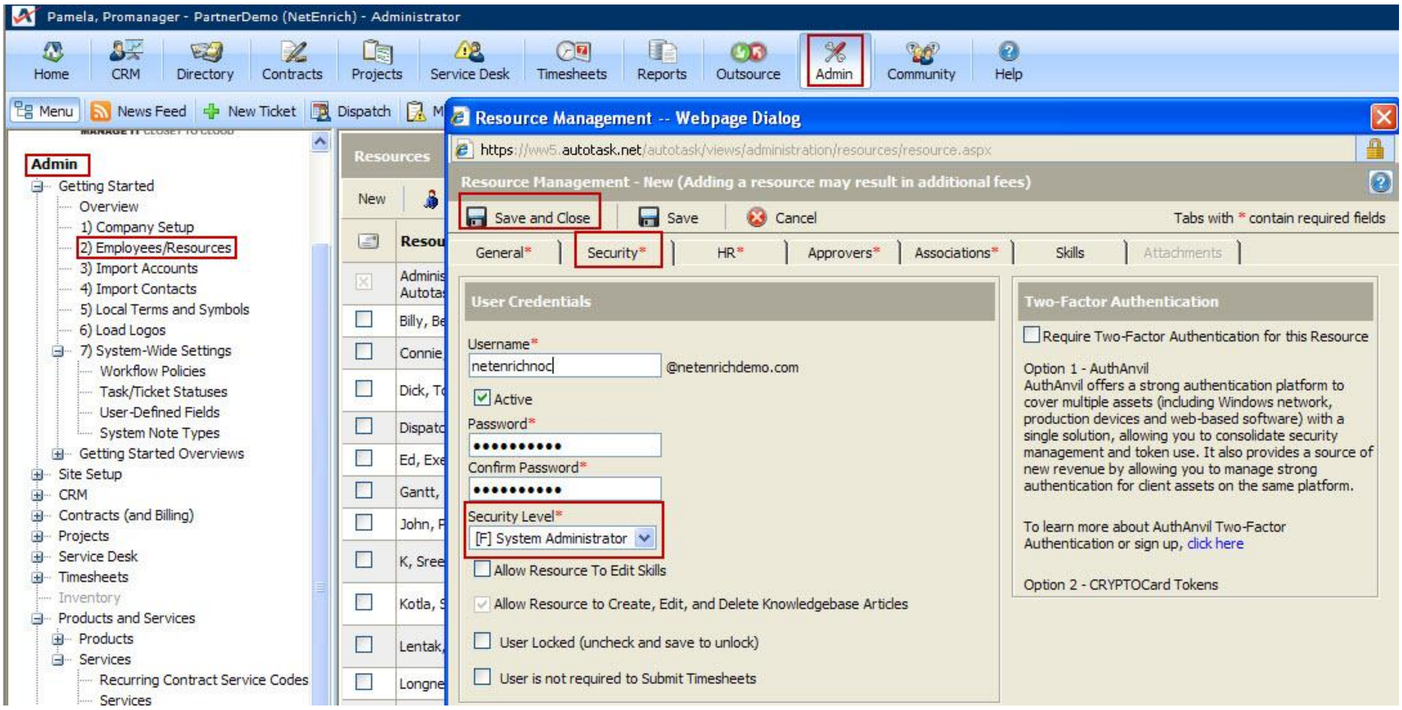


Figure 3 - Admin >> Assigning Permissions

2.3. Enable Web Services API

The VAR needs to call or email Autotask customer support for enabling Autotask Web Services API module. Once the Autotask customer support enables the Web Services API, and the VAR provides details in Partner Portal or email on-boarding team with the appropriate details, integration will be active.

3)Autotask for Asset Integration with Partner Portal

This section shows you how to create necessary, preliminary records in Autotask.

3.1. Step 1: Create User-Defined Fields in Autotask

Creating user-defined fields in Autotask is mandatory, only if the option Portal -> VAR details -> Device Integration Details section -> "Advanced Device Integration" is checked as shown in Figure 9. If unchecked, proceed to step 2.

A job runs on the tenth and twenty fifth of every month to synchronize the asset details from the portal to Autotask. During the synchronization, the portal checks for the user-defined fields shown in Table 1 and if any of these fields is not created in the Autotask, it throws a synchronization error. Hence, these fields are mandatory.

Name	Type	Description
BIOS Name	Text (Single Line)	The name of the BIOS. For example, "Phoenix ROM BIOS PLUS Version 1.10 A03".
BIOS Version	Text (Single Line)	The version of the BIOS. For example, "A03".
Device Type	Text (Single Line)	The type of device such as work station/laptop/server/network devices.
DNS	Text (Single Line)	The name of the Domain Name System (DNS) or Hostname for hierarchical distributed naming system such as "HYDPC111".
Drive Info	Text (Single Line)	The list of drives present in a device and the total disk space allocated to each drive.
Gateway	Text (Single Line)	It is an address for network routers/adapters such as "127.12.221.1" and only the Master Gateway address is populated from a list of network devices identified.
IP Address	Text (Single Line)	An Internet Protocol (IP) address is a unique number assigned to each device such as "175.236.251.2".
Make	Text (Single Line)	Make type such as the company name – "HP" or "Dell Inc." etc.
Model	Text (Single Line)	Model type such as "Dell DV051", if available.
Operating System	Text (Single Line)	The name of the operating system installed along with the service pack version such as "Microsoft Windows XP Professional Service Pack 3".
RAM	Text (Single Line)	The device storage capacity in terms of Gigabytes (GB).
Last Logged User	Text (Single Line)	User ID of the last login on the device. *This helps identify user specific workstations that generally use a cryptic naming convention like adplpt053.*
Partner Portal Device Id	Text (Single Line)	A unique ID assigned to each device in the Portal for easy identification.

Table 1 – Mandatory user-defined fields to be created in Autotask

Perform the below steps to create the user-defined fields in Autotask.

1) Login https://autotask.net with the Autotask username and password.
2) Go to Admin -> Products and Services -> Products -> Configuration Items -> User-Defined Fields.
3) Click New and the user-defined fields window appears as shown in Figure 4.
4) Enter BIOS Name in the Name field.

5) Enter a description (optional).

6) Uncheck the Protected checkbox.

7) In the Field Type field, select Text (Single Line) from the drop-down list.

8) Click Save and Close.

9) Repeat steps 1-8 for each of the other user-defined fields.

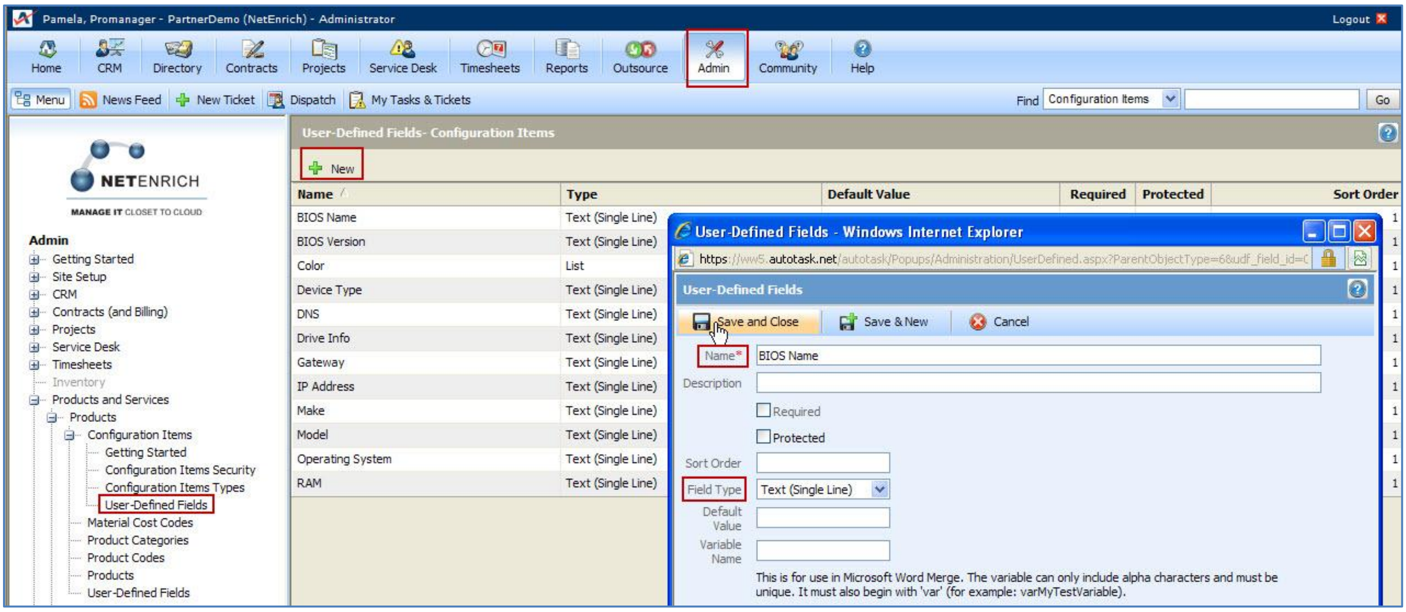


Figure 4 - Autotask -> User-Defined Fields

3.2. Step 2: Create a Configuration Item Type in Autotask

Perform the below steps to create the configuration item type in Autotask.

1. Go to Admin -> Products and Services -> Products -> Configuration Items -> Configuration Item Types.
2. Click New Configuration Item Type, and a window appears as shown in Figure 5.
3. Enter the “Installed Product Type Name” as “NetEnrich Configuration Item Type” or any appropriate item type.
4. Check the Active checkbox.
5. Identify the Autotask user-defined fields and click on the rows corresponding to them. Check the Include checkboxes against them and click OK.
6. Click Save and Close.

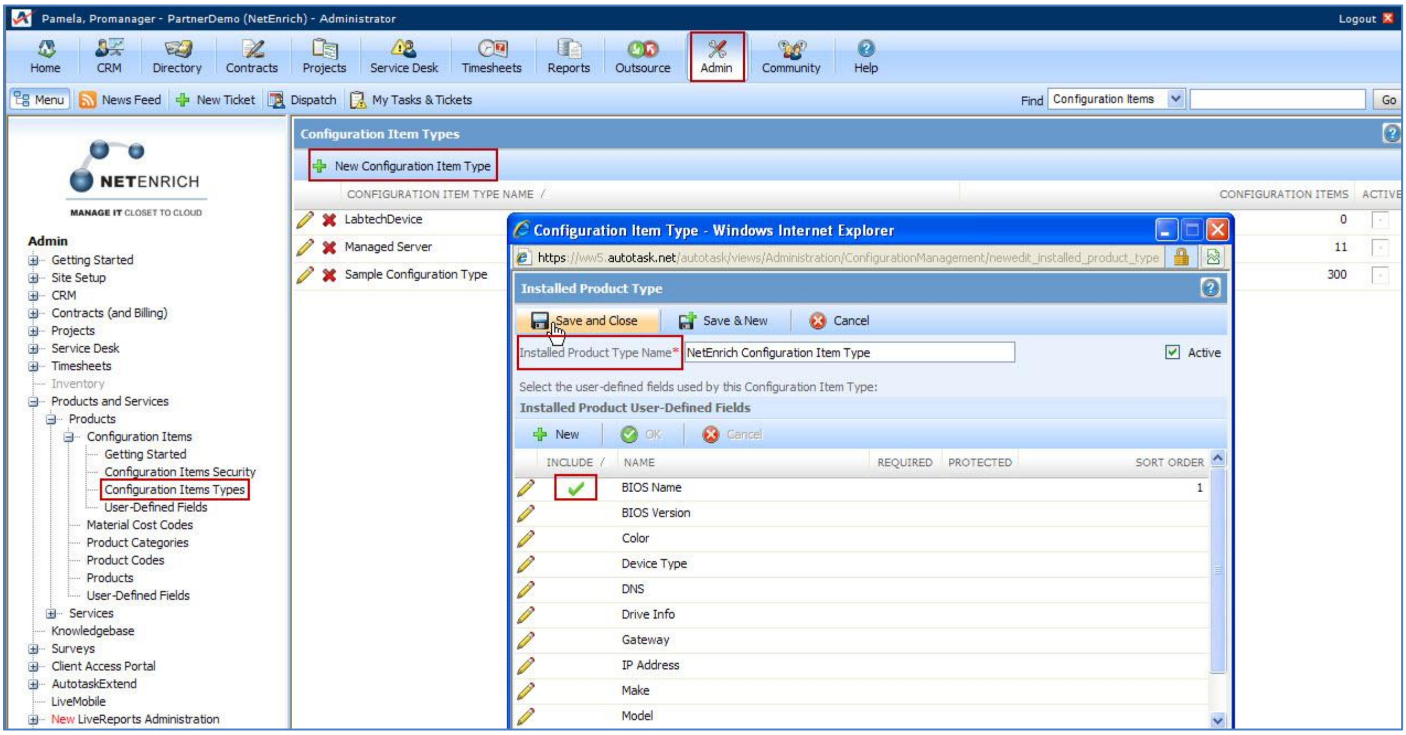


Figure 5 - Autotask -> Configuration Item Types

3.3. Step 3: Create a Product in Autotask

Perform the below steps to create a product in Autotask.

1. Go to Admin -> Products and Services -> Products -> Products.
2. Click New and a new product window appears as shown in Figure 6.
3. Enter a Product Name as “NetEnrich Product” and select a Product Category.
4. Enter a description (optional).
5. Check the Active checkbox.
6. Select a Default Configuration Item Type.
7. Select the Product Code as Non-Taxable Products.
8. Optionally enter data in the remaining fields as desired.
9. Click Save and Close.

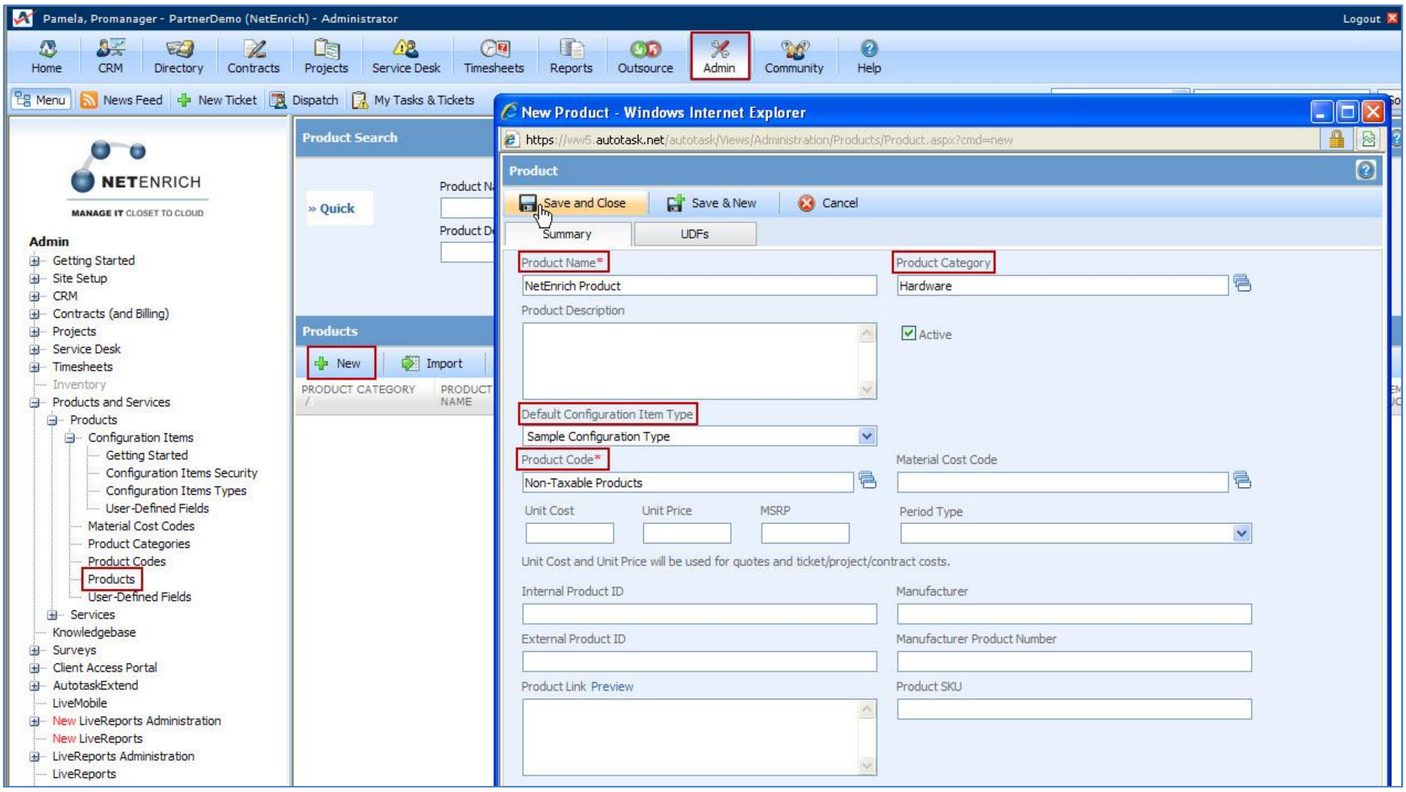


Figure 6 - Autotask -> Products

4) Autotask for Tickets Integration with Partner Portal

4.1. Create a Queue in Autotask

The partner is required to create a new Queue as “**NOC**” in their Autotask system as shown in Figure 7. Services team/technicians at partners will assign tickets to the NOC queue when a ticket has to be worked by the NOC, and will also need to change the status of the ticket as appropriate.

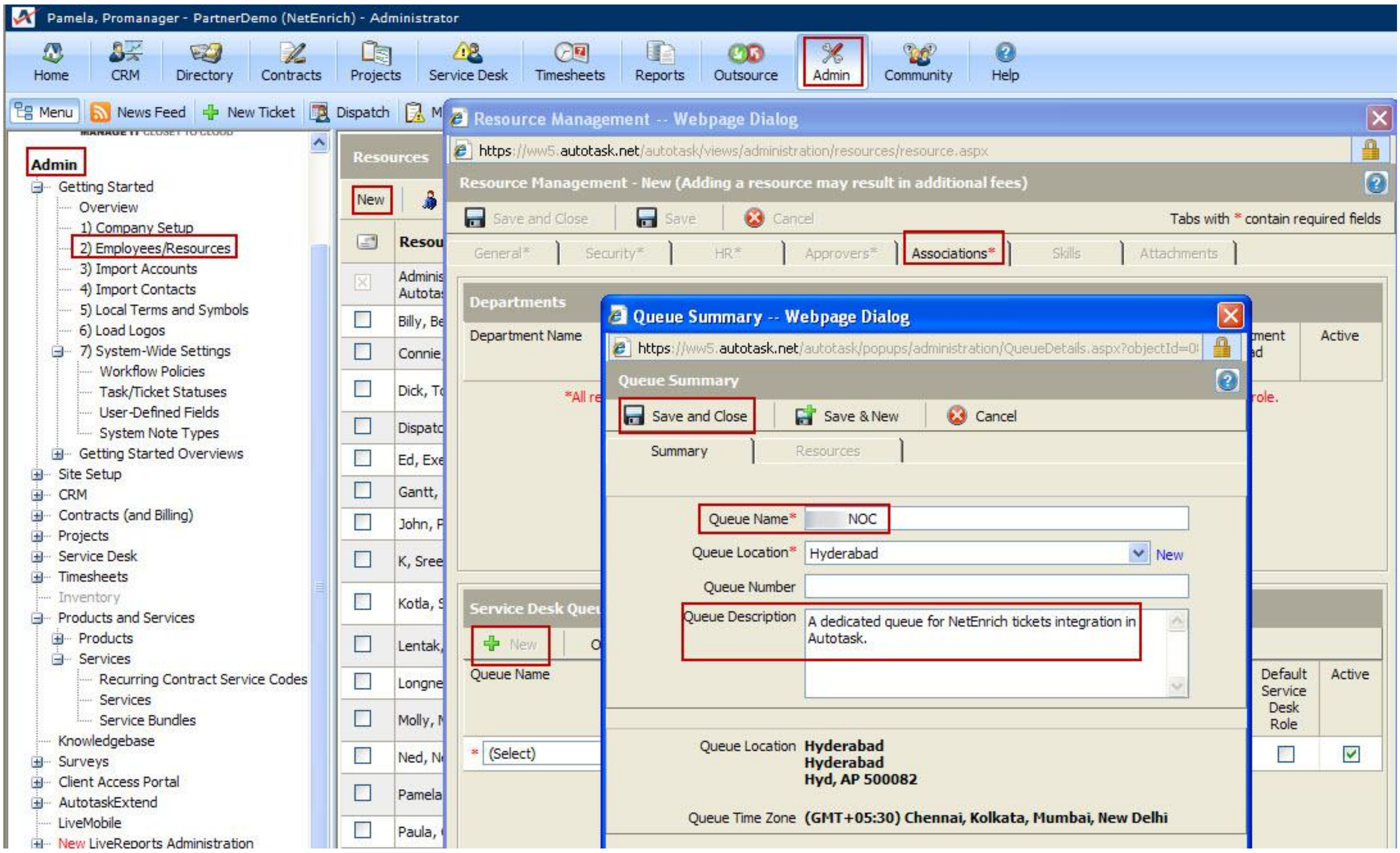


Figure 7 - Creating a New "Queue"

Note: The NOC and Autotask integration will only work for the tickets available in the “NOC” queue.

4.2. Create New Status in Autotask

As a process, NetEnrich requests partners to create following status in the Autotask system if they do not exist. Please inform the Onboarding team (onboarding@netenrich.com) after the following steps are completed. Below are the four statuses that need to be created in Autotask and are as shown in Figure 8.

- **Action required**

The status of the ticket is changed to “**Action required”** in Autotask when any action is required from the Partner. The NetEnrich services team will wait for an update from the Partner and will not work on the ticket with the status as “**Action required”.**

- **Information**

The status “Information” means that NetEnrich services team is working on the ticket, and that updated notes to the ticket will provide information to the Partner on the ticket progress. The responsibility of the ticket is with the NOC and no action is required from the Partner on a ticket with this status.

- **Assigned to NOC**

Partners should change the status of the ticket to *"Assigned to NOC"* if the Partner's technical support team wants the NOC to work on the ticket and complete the remaining task, or to assist to resolution of the issue as per the approval.

E.g. If NetEnrich Services team has changed the status of the ticket to "Action required" in Autotask, it is a request to the partner for a maintenance window to complete a certain task and resolve the issue. The partner in turn will approve the maintenance window by updating the ticket in Autotask and change the status to ***"Assigned to NOC"***. The NetEnrich Services team will take up the task as per the instructions updated in the ticket and resolve the issue.

- **Closed or Completed**

Partner can use this status for the ticket when the issue has been resolved and can be closed. NetEnrich services team will also update the status of the ticket as they resolve the issue and update the ticket.

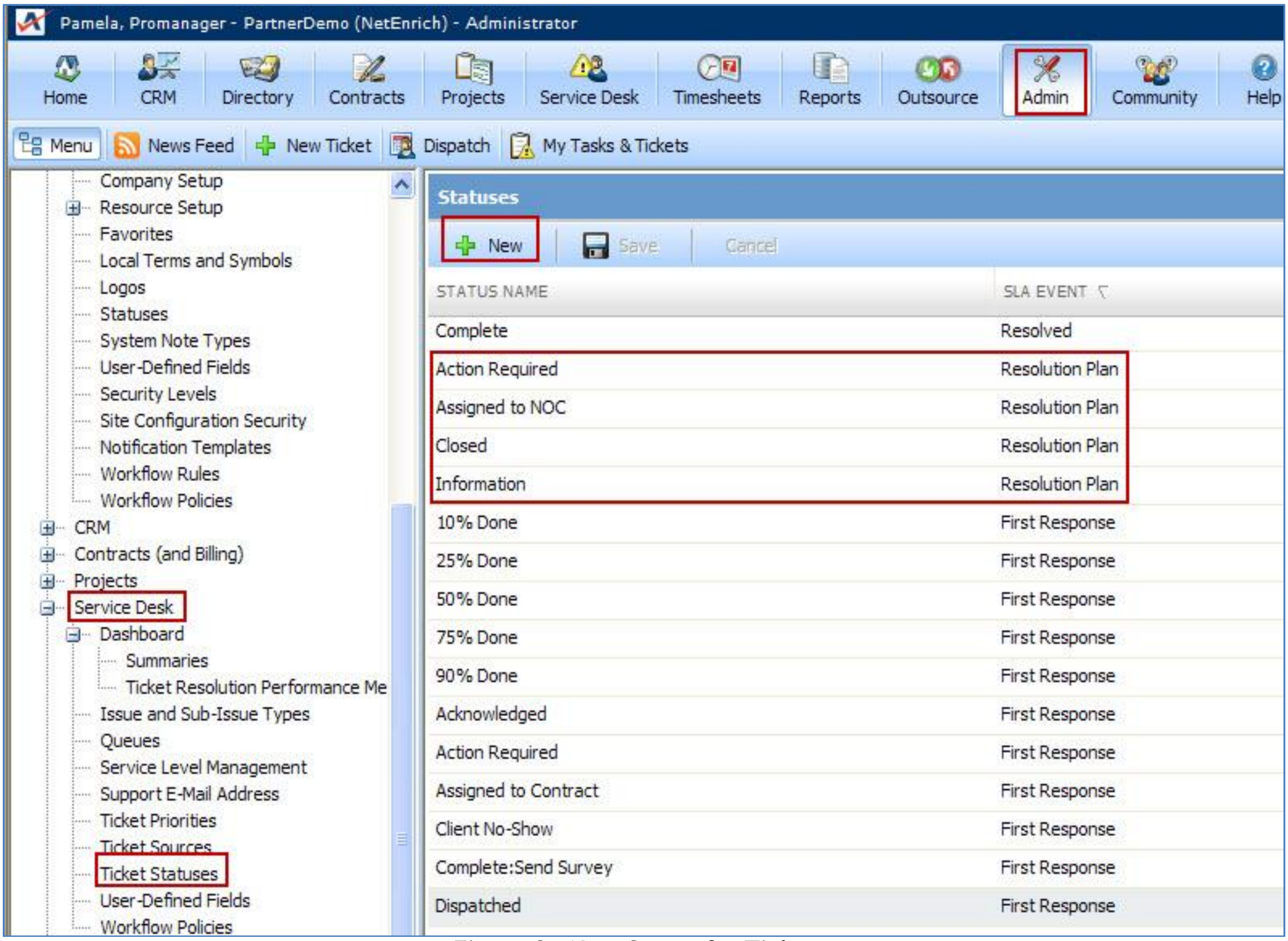


Figure 8 - New Status for Tickets

5) Configure NetEnrich Partner Portal (Service Delivery Function)

5.1. Enable Autotask Integration in the Portal

Login to www.mspnocsupport.com with the login information provided by the NetEnrich team. The partner is required to use the Admin login to configure the Autotask integration with the NetEnrich system.

Nagivation: Setup -> VAR Details -> Edit -> Service Center and Ticketing System Details.

Figure 9 depicts the sections for Ticketing System Information and Device Integration Details for enabling Autotask integration in the portal. To enable the ticketing system, we need to provide the Web Login URL, Company Username and Password, Queue Id and Name and Allocation Id and Name. To enable the device integration, check the "Enable Device Integration" checkbox. Now, you will be allowed to key in the Product, Configuration Item Type and check the checkbox for Advanced Device Integration. Once all the necessary information is provided, the integration between Autotask PSA and the NetEnrich Partner Portal will be successful.

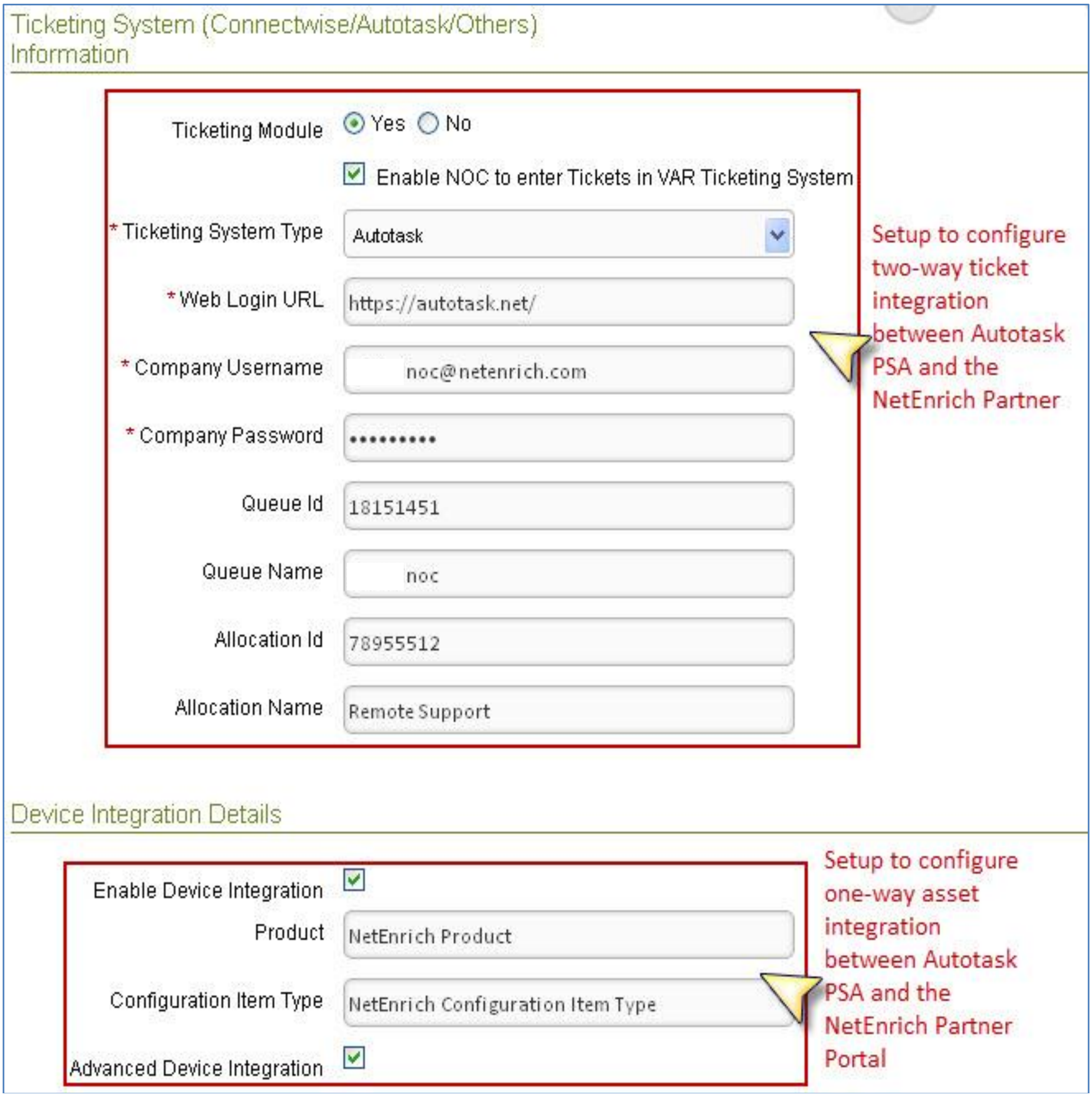
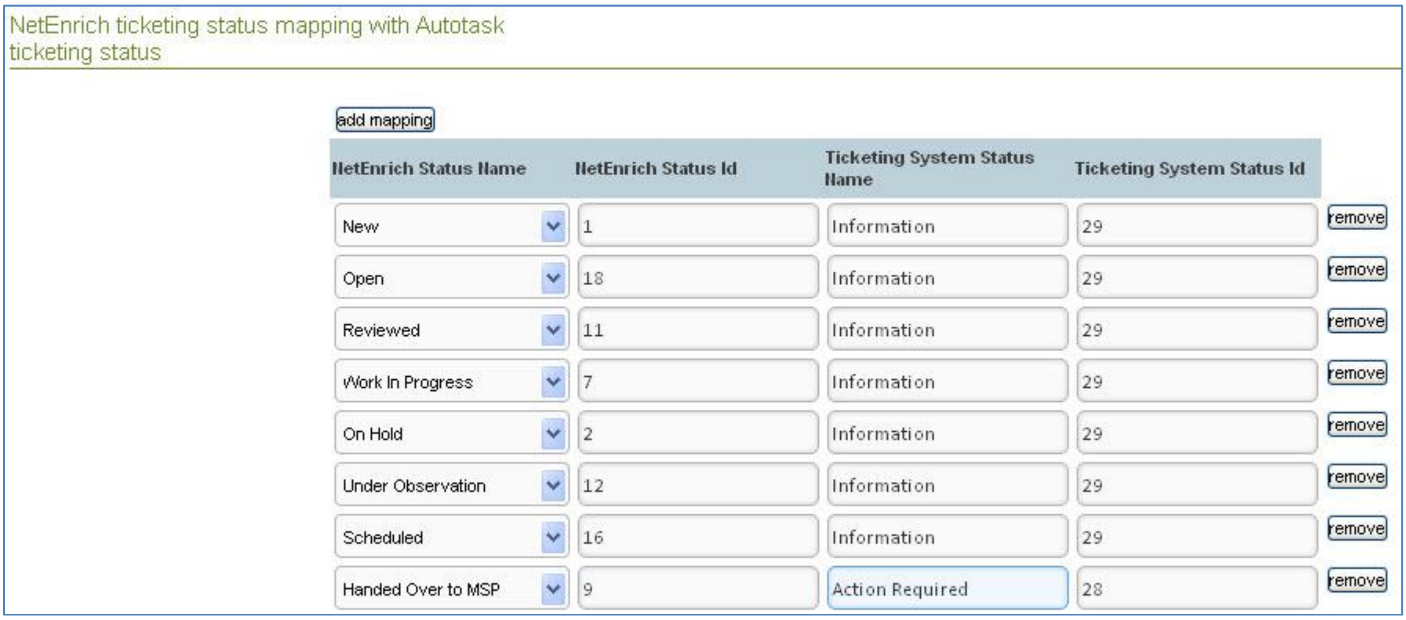


Figure 9 - Portal -> Ticketing System and Device Integration Details

5.2. Define the Ticket Status Mapping in the Portal

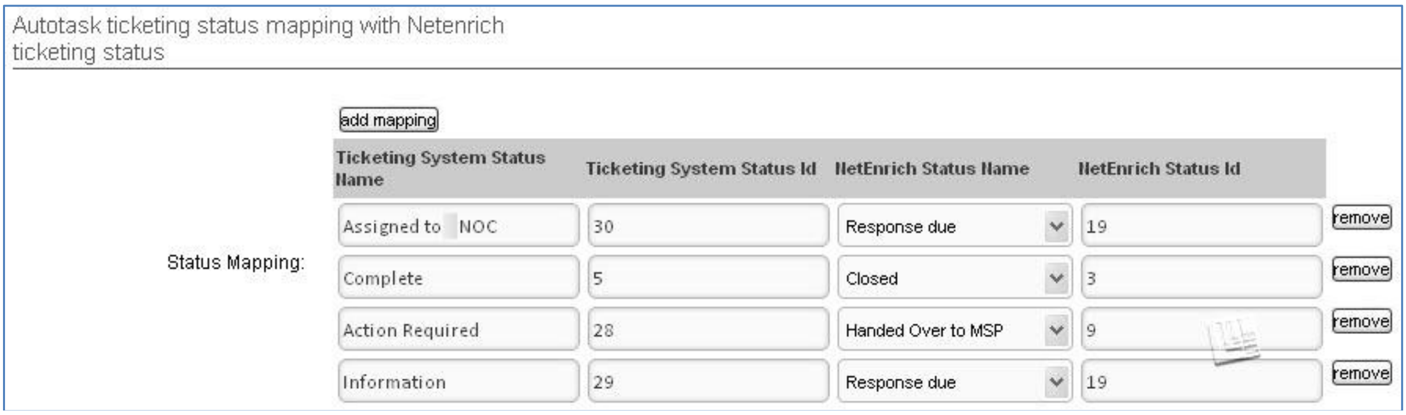
Tickets migrated via the Integration will refer the Ticket Status Translation table to map appropriate status to tickets transferred from one system to the other. Forward mapping table is used when the ticket is created or updated in the portal and transferred to Autotask. Reverse mapping table is used when the ticket is created or updated in Autotask and transferred to the Portal.


NetEnrich ticketing status mapping with Autotask ticketing status

add mapping

NetEnrich Status Name	NetEnrich Status Id	Ticketing System Status Name	Ticketing System Status Id	
New	1	Information	29	remove
Open	18	Information	29	remove
Reviewed	11	Information	29	remove
Work In Progress	7	Information	29	remove
On Hold	2	Information	29	remove
Under Observation	12	Information	29	remove
Scheduled	16	Information	29	remove
Handed Over to MSP	9	Action Required	28	remove

Figure 10 - Ticket Status Mapping Table (Forward)


Autotask ticketing status mapping with Netenrich ticketing status

add mapping

Status Mapping:

Ticketing System Status Name	Ticketing System Status Id	NetEnrich Status Name	NetEnrich Status Id	
Assigned to NOC	30	Response due	19	remove
Complete	5	Closed	3	remove
Action Required	28	Handed Over to MSP	9	remove
Information	29	Response due	19	remove

Figure 11 - Ticket Status Mapping Table (Reverse)

5.3. Define the Ticket Priorty Mapping in the Portal

Tickets migrated via the Integration will refer the Ticket Priority Translation table to map appropriate priority to tickets transferred from one system to the other.

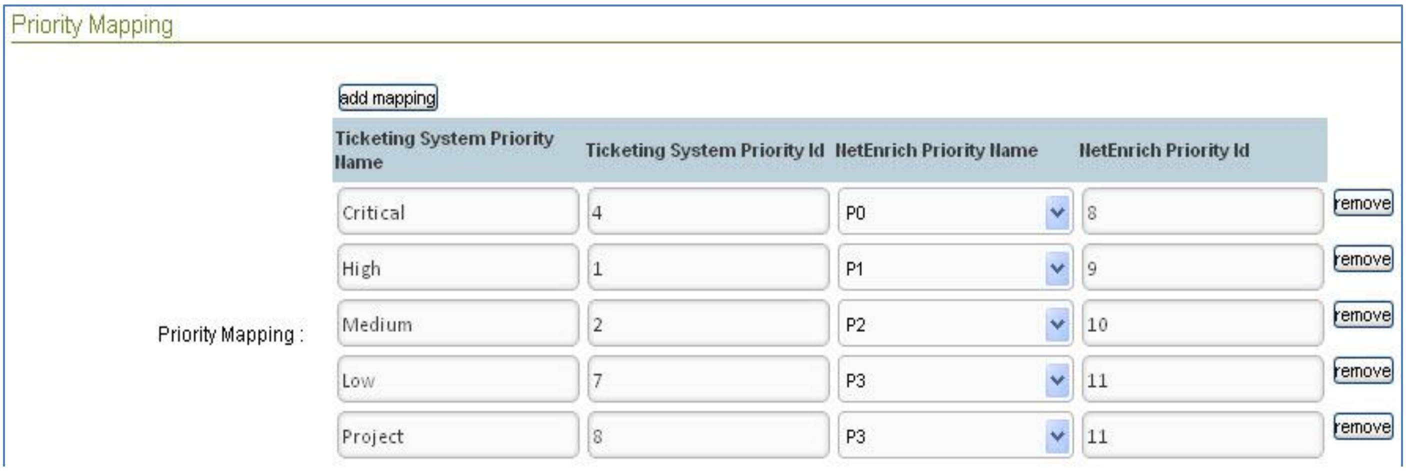


Figure 12 - Priority Mapping Table for the Integration

5.4. Validate the Configuration for Asset Integration

You can use the following method to validate the Asset Integration Configurations.

1. Ensure that the User-Defined Fields, Configuration Item Type and Product are defined correctly in Autotask and Product, Congfiguration Item Type and check the checkbox if you are opting for Advanced Device Integration in the Portal.
2. Click on the Sync button as shown in Figure 13.
3. The Log window will display the status of the Asset Integration.

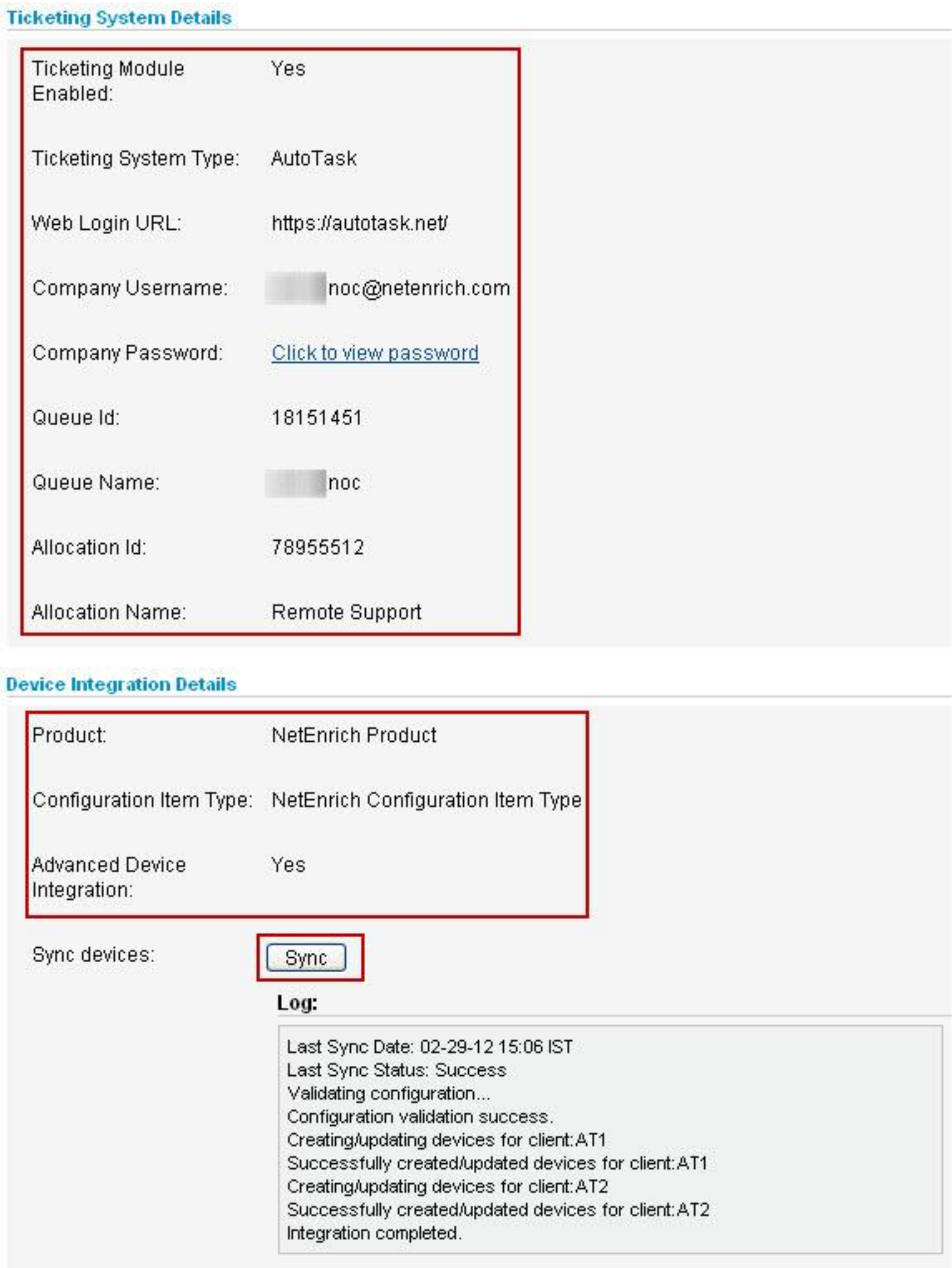


Figure 13 - Validate the Ticket System and Asset Integration

6) Re-seller FAQ

Q1. What is the frequency of the data exchange over the Portal ←→ AutoTask Integration?

A. Assets data is updated into AutoTask first at the time of On-boarding and subsequently, on the 10th and the 25th of every month. Tickets data is exchanged as soon as the ticket is created or updated in either of the two systems after the integration is completed.

Q2. What fields are populated into each AutoTask asset from the Partner Portal device data?

A. The Portal to AutoTask Asset Integration works in two modes 1) Simple Integration and populates Autotask with a few fields per asset and 2) Extended Mode that populates additional User defined fields per Configuration Item in Autotask. [The Re-seller needs to create additional User-defined fields in AutoTask to prior to using the Extended mode.] The following table elaborates the fields per Configuration Item and the mode that they are available in.

Q3. Will this Integration populate AutoTask with details of newly discovered devices in the client environment?

A. Yes. The one-way Integration populates discovered as well as managed devices from the Portal to the AutoTask PSA System. Discovered devices will be marked as in-active within the AutoTask system. Managed devices that are subsequently un-managed will also be marked as in-active.

Q4. Can I make "active" the discovered devices, in AutoTask, and have the NOC initiate managed services on them?

A. No. Asset Integration from the Portal to the AutoTask System is a one-way process. Newly discovered devices are "created" and marked inactive by the integration in AutoTask. Re-seller will need to follow existing off-line Order Management and On-boarding processes (described below) for any changes to managed device inventory in the portal/ AutoTask.

The Re-seller is requested to trigger an offline Order management workflow - using the appropriate service procurement channels, to procure additional SKUs for the managing additional devices/ applications. Following that, the On-boarding process will add/convert the discovered devices to Managed devices in the portal and – they will then be marked as active in AutoTask via this Integration module.

Please note that the offline Order Management workflow is mandatory to ensure that the Re-seller has the requisite SKUs for the adding new managed devices. A proper On-boarding workflow ensures that these devices are appropriately monitored and configured for all scheduled maintenance tasks.

Q5. Will the Asset Integration populate AutoTask with warranty details of the managed hardware that I can view in the portal?

A. Yes. The Portal will populate AutoTask device records with the Serial Tag data and the end of warranty date on managed devices, where available. The Warranty details on all managed devices in your customer environments can also be viewed in the Portal user interface and via Portal Reports like Device Details Report, Custom Report etc.

Q6. Will the tickets created in the Portal and synchronized into AutoTask via the Ticket Integration module, map to devices created via the Asset Integration module?

A. Yes. The Portal ticket is normally associated with the device that generated the alert. The portal uses the AutoTask API to create the ticket in the PSA System and also populates the AutoTask with the unique Configuration Item Id previously allocated by AutoTask. However, if the ticket is associated with multiple alerts from multiple devices, the Portal only maps the ticket to one of those devices. AutoTask associates the CI Id from the Asset Integration module with the CI Id in Tickets.

Additionally, portal also provides a report that showcases the various devices and alerts associated with each ticket.

Q7. I would like to know how much effort has been spent by the NOC on each of the tickets. Can you support Time Entry integration between Portal and AutoTask?

A. At this point we do not update Effort expended/ Time spent on tickets into AutoTask. The Integration will be enhanced to populate the effort data from the Portal Ticketing System into AutoTask PSA via the API, at a later date.