

Autotask Integration Manual

This article explains how to configure BackupAgent integration with Autotask.

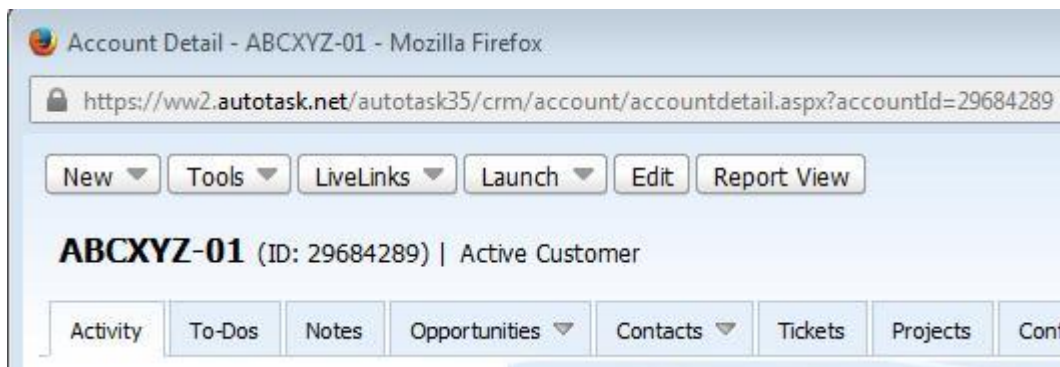
General setup

Currently, in order to be able to synchronize BackupAgent and Autotask, you need to share API credentials with our support department. Please submit a ticket for this [here](#).

Once the APIs are synchronized we can create tickets in Autotask for failed backups and we can upload billing information per customer.

Synchronization setup per customer

In order to synchronize tickets and billing you need to work with the ID of the Autotask customer:



This ID should be stored in the Company field in BackupAgent:

Group	
Group information	
Parent	Robbert Testers
User name	ABCXYZ
Company	29684287
First name	ABC
Last name	XYZ
Address	111 1st street

Ticketing

Once this is done, alle service users in BackupAgent for customer ABCXYZ will open tickets in case of failed backups. Example:

Service Desk Ticket Details T20130929.0009 - ABCXYZ-01, EYAL-PC, Empty Backup

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Account: [BackupAgent Customer ABC 5551212](#) [Site Configuration](#)

United States
[map](#)
Tickets: [Open \(2\)](#) [Show Last 30 Days](#)

Ticket Information: **T20130929.0009 - ABCXYZ-01, EYAL-PC, Empty Backup**
Due **Sunday 10/06/2013 12:00 AM (16d 9h 32m overdue)**
Created by PamelaSM Pierce on 09/29/2013 02:39 PM(22d 18h 52m ago)

DESCRIPTION:

- === Latest Status: Completed_Successfully (09/29/2013 19:04)
- Updated Status: Completed_Successfully (09/29/2013 19:04)
- Updated Status: Completed_UnSuccessfully (09/29/2013 18:54)
- Updated Status: Completed_UnSuccessfully (09/29/2013 18:39)
- Original Failure Report: Completed_UnSuccessfully (09/29/2013 18:28)

* Account

Account: ABCXYZ-01
Computer: EYAL-PC
Version: 4.3.4.9942
Operating System: Windows XP

Billing

To allow BackupAgent to create a billing entry in Autotask for a customer, you need to add a Recurring Service Contract.

1. Click on the 'Admin' Button. The left pane should now contain a tree of elements.
2. Expand the element Products and Services, then expand Services
3. Click on Services to access the list of existing Services.
4. Click New to add a new, editable row to the top of the list of existing Services. Populate the following fields (please make sure the service name is entered exactly as appear below):

- Service Name = BackupAgent Workstation Users
- Period Type = Monthly

- Unit Price = <the default rate per used home user>
 - Allocation Code = Managed Services
5. Optionally populate the description fields.
 6. Click 'Save'
 7. Repeat steps 1-4 for 'BackupAgent Server Users' and 'BackupAgent Storage' with their corresponding default rates.

The newly created services now appear in the 'Services' list:

Now you can add the BackupAgent services to a contract. The contract will need to have the tag '[CloudBackup]' in its description for us to identify the appropriate contract.

1. Open the customer contract and click 'Services' at the Contract Menu
2. Click 'New Service' and select 'BackupAgent Workstation Users', then click 'Save Selection'
3. If the rate for this user is different from the default rate, modify the 'Unit Price' field
4. Click 'Save and Close'
5. Repeat steps 1-4 for 'BackupAgent Server Users' and 'BackupAgent Storage'

Once a month, the 'Units' values are adjusted by the Billing Synchronization feature of the integration software, to match the current usage of the customer:

LiveLinks

Additionally you can configure LiveLinks to allow your service staff to login to the BackupAgent management console directly.

Go to *Admin > LiveLink Designer > Applications > New*

Fill in the fields as follows, using the login credentials for BackupAgent:

The next step is to create a Token as User Defined Field

Go to *Admin > User Defined Fields > Accounts > New*

Fill data as follows:

Save and close this form.

Notes:

- The value of the UDF-BackupAgent Token will be automatically set by the Autotask Synch application for the main/owner account every 24 hours.
- Initially, this value can also be set manually by editing the main account, under 'User Defined' tab.

Once the parameters are created, the actual Form Post LiveLink can be created.

Go to *Admin > LiveLink Designer > New*

Category: Managed Services

LiveLink Application Name: BackupAgent

Entity: Account

Example Base URL: {{PROTOCOL://BACKUP PLATFORM URL}}/ManagementConsole/Login.aspx

Form Post parameters:

loginForm1\$btnLogin	Login
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loginForm1\$txtUsername	<Application_Username> (selected from LiveLink Parameters menu on left)
loginForm1\$txtPassword	<Application_Password> (selected from LiveLink Parameters menu on left)
__VIEWSTATE	<UDF-BackupAgent Token(tblCustomers)> (by selecting Account BackupAgent Token from menu on left)

- 1 Save and close (click OK if necessary)
- 2 In the LiveLink Grid, right-click on 'BackupAgent Reports' and select 'Publish LiveLink'
- 3 Click on the tabs 'Security Levels', 'Departments' and 'Resources' and make selstcion as for who can use the LiveLink.
- 4 Save and close

Access the LiveLink

In 'Accounts' view

Right-click on the main (owner) account> *LiveLinks* > *Access BackupAgent Reports*

Notes:

1. Before using the link for the first time, make sure that **Autotask Synch** application has updated the value of the UDF-BackupAgent Token.
2. Initially, this value can also be set manually by editing the main account, under 'User Defined' tab.