Acronis Data Cloud

Autotask Integration

QUICK START GUIDE

Revision: 04.10.2018

Table of contents

1 Introduction

This document describes how to integrate Acronis Data Cloud ("the cloud platform") with Autotask Professional Service Automation (PSA).

The integration allows the following:

1. Provisioning of the cloud platform services to new and existing Autotask accounts from the Autotask user interface.
2. Automatic creation of tickets for backup, recovery, or quota-related issues in Autotask.

2 Activating your account

Before setting up the integration, please obtain an Acronis Data Cloud account directly from Acronis or from a partner sales representative. To obtain an account from Acronis, go to https://www.acronis.com/provider/backup-cloud, choose your region if asked, and then click **Request a Quote**.

After signing the partnership agreement, you will receive an email message containing the following information:

- **An account activation link.** Click the link and set the password for your account. Remember the login that is shown on the account activation page.
- **A link to the login page.** By using this link, you can access the backup console directly from a web browser. The login and password are the same as in the previous step.

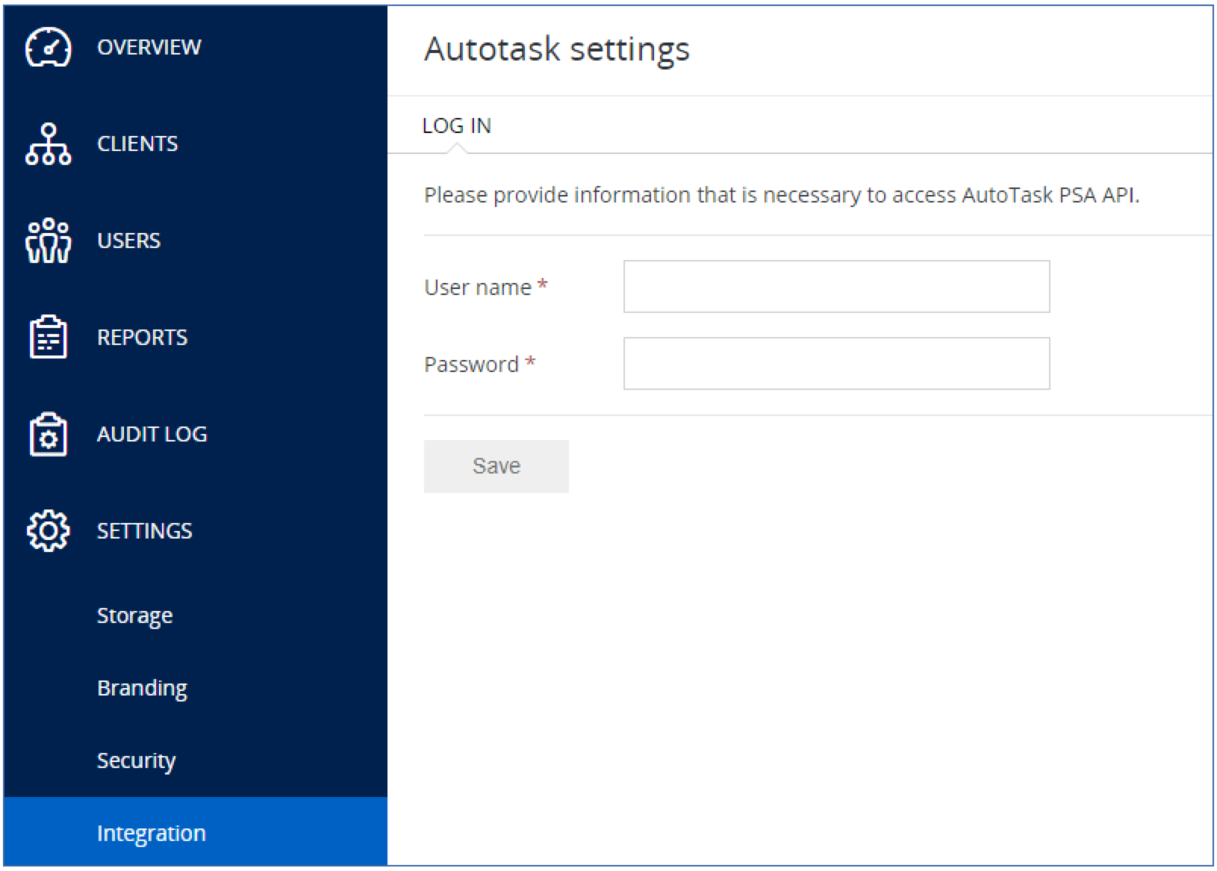
3 Configuring Autotask

Before setting up the integration, do the following:

1. Go to the Autotask user interface.
2. Navigate to **Admin** > **Features & Settings** > **Products & Services**, and then select **Services**.
3. Add new services for the following offering items of the cloud platform:
   - Workstations
   - Servers
   - Virtual machines
   - Mobile devices
   - Office 365 mailboxes
   - Websites
   - Local backup
   - Cloud storage for backups
   - File Sync & Share users
   - Cloud storage for files
4. [Optional] Select **Service Bundles**, and create service bundles.

4 Setting up the integration with Autotask

1. Log in to the management portal.
2. Click **Settings** > **Integration** > **Autotask**.
3. On the **Log in** tab, specify your Autotask user name and password.
4. Click **Save**.



5 Configuring the billing and provisioning

1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **Autotask integration status**) > **Settings** > **Billing and provisioning**.
3. Select the **Enable** check box.
4. Select the corresponding Autotask service for each of the offering items.

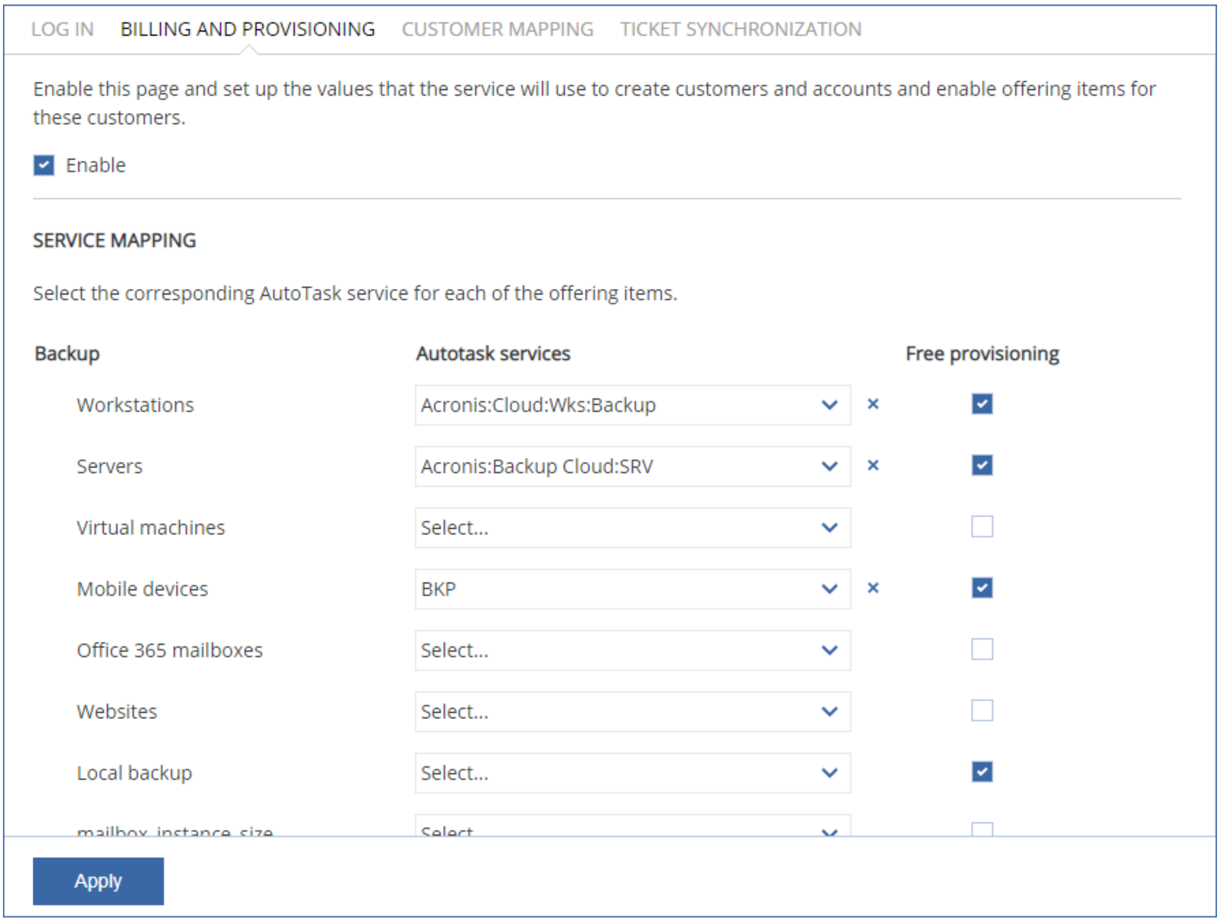
   If a service is not selected, the offering item quota will be set depending on the **Free provisioning** option. If **Free provisioning** is disabled, the quota will be set to zero. If **Free provisioning** is enabled, the quota will be set to unlimited.

   If a service is not included in a contract, the offering item quota will be set the same way as above.

   If no services linked to cloud storages are included in a contract, the default storage will be assigned to a customer during provisioning. If you have several storages, you can choose which one is considered default.

5. [Optional] Configure the customer provisioning and customer deprovisioning in the corresponding sections.
6. Click **Apply**.

The synchronization between the cloud platform and Autotask may take up to 15 minutes.



6 Configuring the customer mapping

To map an Autotask account to an existing customer within the cloud platform, do the following:

1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **Autotask integration status**) > **Settings** > **Customer mapping**.
3. Select an Autotask account.
4. Click **Map to existing customer tenant** on the right panel.
5. Select a partner, and then select a customer within this partner.
6. Click **Map**, and then click **Apply**.

To map an Autotask account to a new customer within the cloud platform, do the following:

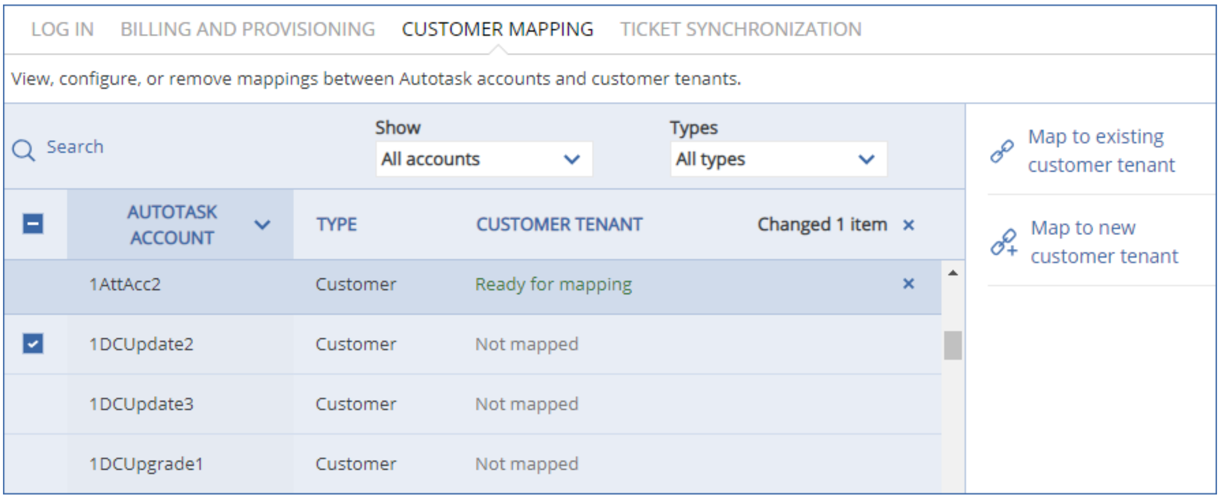
1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **Autotask integration status**) > **Settings** > **Customer mapping**.
3. Select an Autotask account that has the **Not mapped** value in the **Customer tenant** column.

4. Click **Map to new customer tenant** on the right panel, and then click **Apply**.

To remove the mapping, do the following:

1. Select a mapped Autotask account.
2. Click **Remove mapping** on the right panel.
3. Confirm the removal by clicking **Remove**, and then click **Apply**.

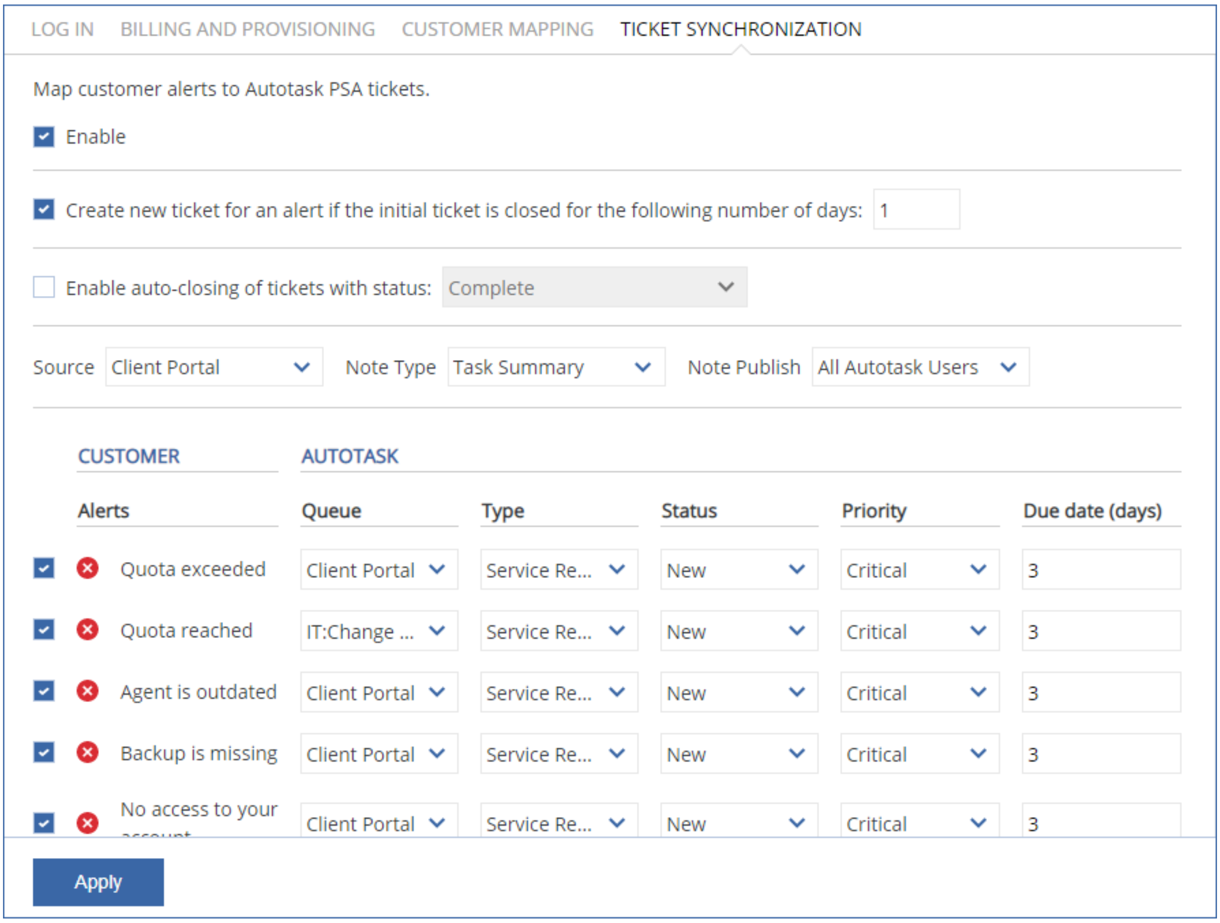
The synchronization between the cloud platform and Autotask may take up to 15 minutes.



7 Enabling automatic creation of tickets

1. Log in to the management portal.
2. Go to **Settings** > **Integration** > **[...]** (next to **Autotask integration status**) > **Settings** > **Ticket synchronization**.
3. Select the **Enable** check box.
4. In **Source**, select the source for all tickets that will be created based on customer alerts.
5. Set the **Note Type** and **Note Publish** values for all tickets that will be created based on customer alerts.
6. Configure the parameters for each of the customer alerts.
7. [Optional] If you want to create a new ticket for a mapped alert every time the initial ticket for this alert has been closed for a specific number of days, select **Create a new ticket for an alert...** check box, and then specify the number of days. Otherwise, the initial ticket will be re-opened on every occurrence of the alert.
8. [Optional] If you want to automatically close tickets originated from alerts when issues that generated these alerts are resolved, select the **Enable auto-closing of tickets...** check box, and then select the status that will be assigned to a closed ticket in Autotask.

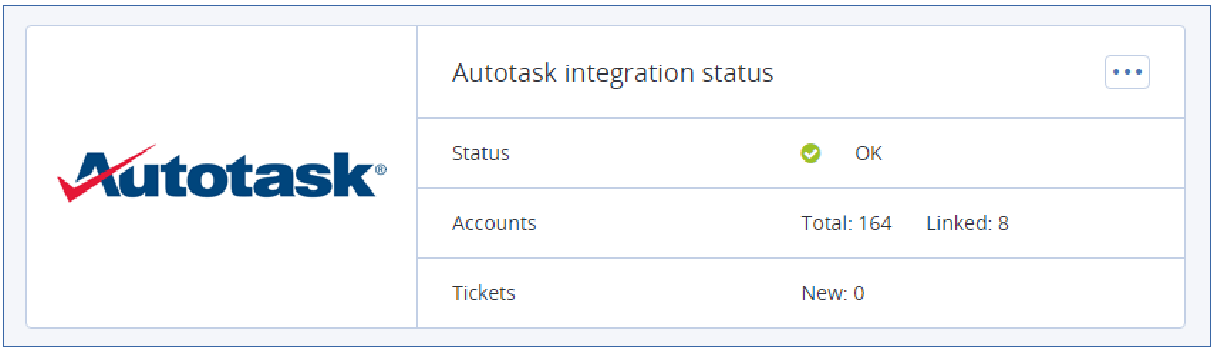
9. Click **Apply**.



8 Viewing the integration summary

1. Log in to the management portal.
2. Click **Settings** > **Integration**.

The information about the integration status will appear.



9 Creating a contract for the backup service

1. Open the Autotask user interface.
2. Go to **New** > **Recurring Service**.

3. Set **Contract Name**, **Account Name**, **Start Date**, **End Date**, and any other contract parameters.
4. Click **Next**.
5. Add services and/or service bundles with the cloud paltform services. Set the number of units for each bundle or service.
6. Finish the wizard.

If the account is not mapped to a customer within the cloud platform and auto-provisioning is enabled on the **Billing and provisioning** tab, a new customer will be created for this account.

If the account is not mapped to a customer within the cloud platform and auto-provisioning is disabled, map this account manually on the **Customer mapping** tab.

If the account is already mapped to a customer within the cloud platform, the quotas for this customer will be updated.

The synchronization between the cloud platform and Autotask may take up to 15 minutes.

10 Viewing tickets originated from customer alerts

1. Open the Autotask user interface.
2. Go to **Dashboard** > **Service Manager**.