Acronis Cyber Cloud
Integration with Autotask PSA

Integration Guide

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Introduction

This document describes how to integrate Acronis Cyber Cloud with Autotask Professional Service Automation (PSA).

The integration allows you to do the following:

- Provisioning of the Acronis Cyber Cloud services to new and existing Autotask accounts by using the Autotask console.
- Automatic billing of customers on a prepaid basis in the Autotask console.
- Automatic creation of tickets for backup, recovery, or quota-related issues in Autotask.
Prerequisites

You must have active accounts in Acronis Cyber Cloud and Autotask.
Setting up integration

To set up integration between Acronis Cyber Cloud and Autotask

1. Configure Autotask.
2. Set up integration by specifying login data on the Acronis Cyber Cloud site.

Configuring Autotask

Features are available as part of either Standard or Advanced Protection packs. Advanced Protection extends the Standard version with further protection capabilities that can be added only on top of it and are charged additionally. Advanced Protection can be assigned only to a workload that already has Standard Protection assigned.

Before setting up integration, do the following

1. Log in to the Autotask console.
2. Go to Admin > Features & Settings > Products & Services, and then select Services.
3. Add new services for the following offering items available as workloads in the Standard Protection pack of Acronis Cyber Cloud:
   - Workstations
   - Servers
   - Virtual machines
   - Web hosting servers
   - Microsoft 365 seats
     - Microsoft 365 Mailboxes
     - Microsoft OneDrive
   - Microsoft 365 seats (unlimited Acronis Hosted cloud storage included)
   - Mailboxes
   - OneDrive
   - Microsoft Hosted Exchange
   - Google Workspace seats
   - Google Workspace seats (unlimited Acronis Hosted cloud storage included)
   - G Suite seats
     - Gmail (incl. Calendar, Contacts)
     - Google Drive
   - Google Workspace Team Drive
   - Mobile devices
   - Websites

Advanced packs support multiple offering items.

You can edit the auto-mapped service names either by creating new ones or by selecting from a list of already existing names. When you define a new service name, it will be automatically
created on the Autotask side.

4. [Optional] Select **Service Bundles**, and create service bundles.

### Setting up integration with Autotask

Acronis uses Autotask API credentials for authentication.

To create your Autotask API user:

1. Log in to Autotask.
2. Navigate to the **Admin** section, then go to the **Resources (Users)** page.

![Admin section](image)

3. Select **New API User** from the **New** button drop-down menu.

![New API User](image)

4. The **Add API User** window will open next. Populate the **First Name**, **Last Name** and **Email**
Address contact fields with the necessary user details.

5. Select **API User (system)** from the **Security Level** drop-down menu.
6. In the **General** section, click on **Generate Key** and **Generate Secret**.
7. Select **Integration Vendor** in the **API Tracking Identifier** section. Then from the drop-down menu, choose **Acronis - Acronis Cyber Cloud**.
8. Click **Save** and **Close**.

**Note**
Autotask API users can be assigned to one or more Lines of Business. This is done in order to control their access to contracts, belonging to a specific Line of Business unit.
We recommend not assigning Lines of Business to API users, created for the Acronis integration. This will guarantee that the Autotask API user has access to all contracts and prevent the occurrence of mapping issues.

For more information on how to create an API user, refer to the Autotask documentation.
Upgrading integration credentials

If you have the integration set up with a regular Autotask user instead of an API user, you will see the following error message, displayed on the Integrations page in your Acronis account:

"Please create an API user with the integration name "Acronis - Acronis Cyber Cloud" and update current user credentials, according to the Autotask PSA API version 1.6 requirements."

Follow these instructions to upgrade your Autotask user to an API user:
https://kb.acronis.com/content/64074

Enabling the integration

After you have created your API user in Autotask, you can start configuring the integration in Acronis:

1. Log in to the Acronis Management portal.
2. Go to Integrations > Autotask PSA.
3. Provide your Autotask API Key and Secret.
4. Click Save.

As a result, you should have configured the integration between Acronis Cyber Cloud and Autotask PSA.

The following three major sections will become visible and accessible:

Integration Settings

Provides all configuration options for the integration:

- Enable/disable ticket creation feature
- Configure the way customer tenants are provisioned in Acronis
- Configure the synchronization between Acronis alerts and Autotask PSA tickets

Customer Mapping

Provides functionality to map Autotask PSA customers to new or existing Acronis customer tenants.
Ticket Creation

Provides functionality that configures which alerts raised in Acronis should have tickets created in Autotask PSA.
Integration scenarios

Provisioning (automatic or manual)

**Automatic provisioning** means that when you create a customer in Autotask, a corresponding tenant will be automatically created in Acronis Cyber Cloud and Acronis services will be provisioned for it.

**Manual provisioning** means that a corresponding tenant will not be automatically created in Acronis Cyber Cloud. You may need manual provisioning when you already have customer accounts in Autotask and Acronis Cyber Cloud, and you want to map them manually.

To set up provisioning
1. Configure service mapping.
2. Create a contract.
3. Depending on the type of provisioning:
   - Automatic: configure the provisioning settings.
   - Manual: configure the customer mapping.

Billing (Prepaid or Pay-as-you-go)

**Prepaid billing** implies setting quotas to Acronis Cyber Cloud offering items based on the values defined in contracts in Autotask.

**Pay-as-you-go (PAYG) billing** means charging a customer for the actual resource usage at a defined rate. If the PAYG billing is defined, resource usage is synchronized between the Acronis Cyber Cloud and Autotask at regular intervals.

The integration creates a new Acronis **PAYG** user-defined field for the Autotask contracts, used to determine whether the contract is of PAYG or Prepaid type. You will be prompted to set this field when creating new contracts. By default, Prepaid billing type is used.

**Note**
Contracts cannot have both PAYG and Prepaid additions.

To set up billing
1. Configure the service mapping.
2. Create a contract.
3. Configure the customer mapping.

Ticket synchronization

**Ticket synchronization** translates Acronis Cyber Cloud alerts into Autotask tickets. You can configure creating and auto-closing rules, as well as assign the priority, status, and other parameters
of tickets.

*To set up automatic ticket synchronization*

1. Configure alert mapping.
2. Configure customer mapping.
Configuring integration

Configuring the provisioning settings

To configure the provisioning settings

1. Go to the Integration settings tab.
2. In the Credentials section, set username and password.
3. In the section below, use the switch buttons to turn on and off the billing, two-way sync and ticket creation features.
   If you enable two-way sync, you have to specify also Allocation code (this field uses dynamic values) and Period type (select from a list of available values: Monthly, Quarterly, Semi-Annual or Yearly). These are default settings for new services.
4. Scroll down to Customer Provisioning and change the configuration settings.
   • In Create accounts based on, make a selection from the drop-down list: Company name or Company primary contact. For the first, you have to fill in Activation email as well.

   - For automatic tenant creation of customers for Autotask accounts with assigned offering items, enable the Automatically create customers option.
   - For manual creation of these, disable it.
   - To enable the two-factor authentication for all new customers, select the corresponding check box.
When turned on, customers are provisioned with active two-factor authentication and all their users have it enabled as well.

5. Scroll further to Customer deprovisioning, where you can set the following:
   - **Set offering item quotas to zero** - enable/disable by selecting or deselecting this check box
   - **Disable the customer** - use the check box to enable and disable; if enabled, use the + and - buttons to set number of days after which the account will be disabled if it doesn't have any active services.
   - **Delete the customer** - check or uncheck the box to enable and disable; then if enabled, use the + and - buttons to set number of days after which the account will be deleted if it doesn't have any active services.

6. At the bottom of the page you will see the following options in the **Tickets** section:
   - **Ticket re-opening** - after marking the check box, using the + and - buttons, set number of days after which new tickets will be created for alerts with initial tickets closed. Otherwise, the initial ticket will be re-opened on every occurrence of the alert.
   - **Ticket auto-closing** - to automatically close tickets that originated from alerts with certain status, select this check box and then select the status from the drop-down menu.
     - **Source** - select the source for all tickets that will be created based on customer alerts
     - Set the **Note Type** and **Note Publish** values for all tickets that will be created based on customer alerts.
   - **Provision customer tenants as** - from the drop-down list, select either **Production** (default) or **Trial**. Customers are automatically switched to production mode after a full month trial.

**Note**

Customers in trial mode have full access to all integration functionalities, but only for a limited period of time (the duration of the trial).

The synchronization between Acronis Cyber Cloud and Autotask may take up to 15 minutes.

See also [Setting up two-factor authentication](#).
## Configuring the service mapping

**To configure service mapping**

1. Open the **Billing** tab. You will see a list of offering items (services), divided into groups.

<table>
<thead>
<tr>
<th>Standard Protection</th>
<th>Autotask services</th>
<th>Provisioning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workstations</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Workstations (included features)</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Servers</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Servers (included features)</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Virtual machines</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Virtual machines (included features)</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Web hosting servers</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Web hosting servers (included features)</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Mobile devices</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Microsoft 365 seats</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Microsoft 365 shared seats</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Mailboxes</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>OneDrive</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Microsoft 365 SharePoint Online</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Microsoft 365 Teams</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Google Workspace seats</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Gmail (incl. Calendar, Contacts)</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Google Drive</td>
<td>Select service</td>
<td>Free</td>
</tr>
<tr>
<td>Google Workspace Shared Drive</td>
<td>Select service</td>
<td>Free</td>
</tr>
</tbody>
</table>

2. For each Cyber Cloud service, you can set up mapping between data sources and Autotask services. For this purpose, click **Select service** on the corresponding row.

3. In the window that opens next, either create a new service or select an existing one.

4. (Optional) In the **Provisioning** column, mark the **Enable** check box for services that you want mapped but free of charge.

5. Click **Apply**.

For more details, refer to the **Acronis Cyber Cloud Partner's Guide**.
If a service is not selected, the offering item quota will be set depending on the **Provisioning** option. If the **Free** option is not selected, the quota will be set to zero. If the **Free** option is selected, 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.

### Configuring the customer mapping

**To map an Autotask account to an existing customer within Acronis Cyber Cloud**

1. Switch to the **Customer mapping** tab.
2. Select an Autotask account. To filter the list of accounts shown, use the **Search** bar or the two drop-down menus. The **accounts** menu lets you show only mapped, unmapped or all available accounts. The **types** drop-down menu allows filtering for a specific account type.
3. Click **Map to existing customer tenant** on the right panel.
4. In the window that opens next, select an Acronis customer tenant. Use the **Search** option to filter the list of already existing customers and easily navigate to the preferred one.

5. Click **Apply mapping**.

**To map an Autotask account to a new customer within Acronis Cyber Cloud**
1. On the **Customer mapping** tab, select an Autotask account that has the **Not mapped** value in the **Customer tenant** column.

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

**To remove the customer mapping**

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 Acronis Cyber Cloud and Autotask may take up to 15 minutes.

**Configuring the alert mapping**

**To configure the alert mapping**

1. Switch to the **Ticket synchronization** tab.

2. Mark the check boxes of the alerts, which parameters you want to configure.

3. On each alert row, make the corresponding selections in the drop-down lists.

4. Click **Apply**.
Creating a contract

To create a contract

1. Log in to the Autotask console.
2. Go to **New > Recurring Service**.
3. Set **Contract Name, Account Name, Start Date, End Date**, and any other contract parameters.
4. Click **Next** to go to the **User-Defined Fields** tab and set the **Acronis PAYG** option to either Yes or No, depending on the type of billing you want this contract to have.

![Contract Wizard (Recurring Service)](image)

It is also possible to edit this setting for an already created contract.

5. Click **Next**.
6. Add services and/or service bundles with the Acronis Cyber Cloud services. Set the number of units for each bundle or service.
7. Complete the wizard steps.

If the account is not mapped to a customer within Acronis Cyber Cloud and auto-provisioning is enabled on the **Integration settings** tab, a new customer will be created for this account.

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

If the account is already mapped to a customer within Acronis Cyber Cloud, the quotas for this customer will be updated or the usage - reported into this contract, depending on the PAYG setting.

The synchronization between Acronis Cyber Cloud and Autotask may take up to 15 minutes.

Viewing tickets that originated from customer alerts

To view tickets that originated from customer alerts

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

You can check the specific contract under which the ticket was generated. The contract name is included in the ticket, on the condition that:

- The Autotask account is mapped to a customer within Acronis Cyber Cloud
- Billing and provisioning is enabled and Cyber Protection services are mapped
- Ticket synchronization is enabled