

Acronis



# Acronis Cyber Cloud Integration with Autotask

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# 1 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.

## 2 Prerequisites

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

## 3 Setting up integration

***To set up integration between Acronis Cyber Cloud and Autotask***

1. Configure Autotask (p. 3).
2. Set up integration by specifying login data on the Acronis Cyber Cloud site (p. 4).

### 3.1 Configuring Autotask

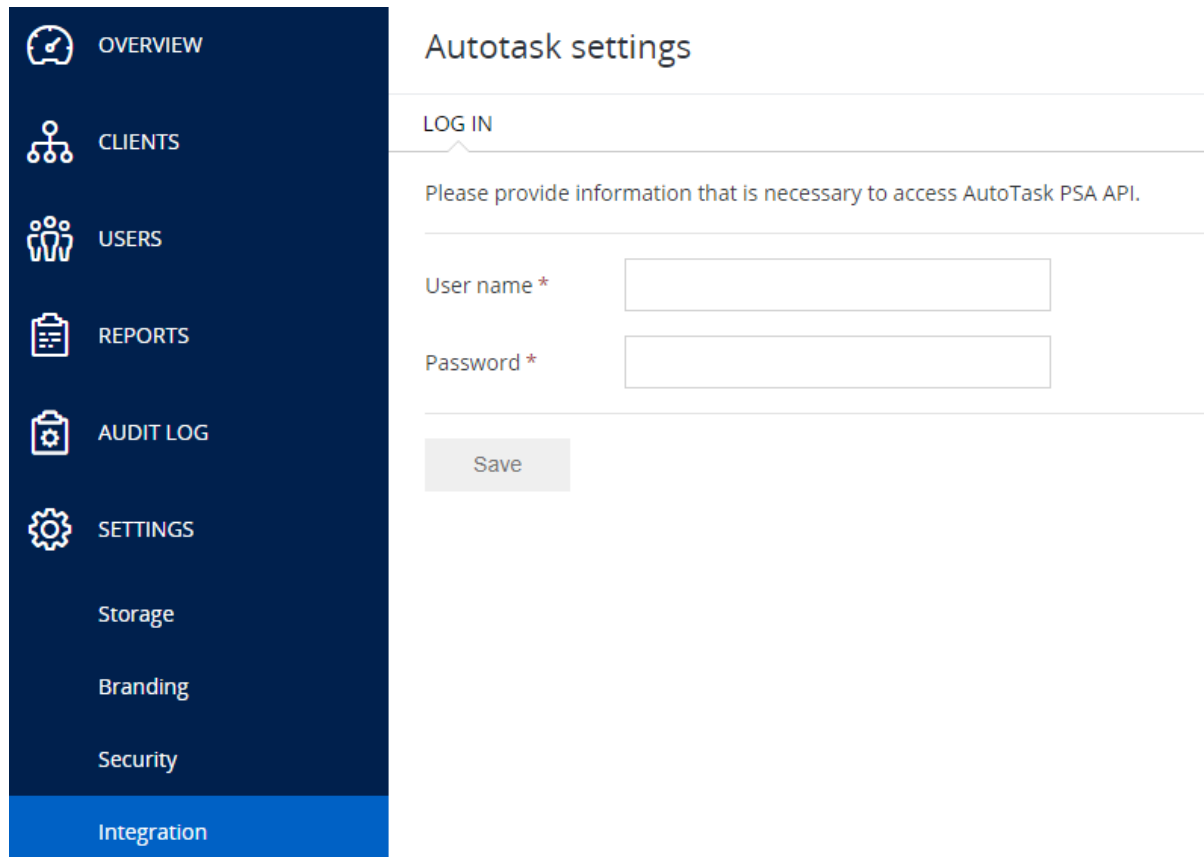
***Before setting up integration, do the following***

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 offering items of Acronis Cyber Cloud. For example:
  - Workstations
  - Servers
  - Virtual machines
  - Mobile devices
  - Office 365 mailboxes
  - Websites
  - Local backup
  - Cloud storage for backups
  - File Sync & Share users
  - Cloud storage for files
  - And other
4. [Optional] Select **Service Bundles**, and create service bundles.

## 3.2 Setting up integration with Autotask

### *To define the login data required for integration*

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



Autotask settings

LOG IN

Please provide information that is necessary to access AutoTask PSA API.

User name \*

Password \*

Save

## 4 Integration scenarios

### 4.1 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. Another case is when you have a customer account in Autotask and you want to create a corresponding tenant manually in Acronis Cyber Cloud.

#### *To set up provisioning*

1. Configure product mapping (p. 5).
2. Create a contract (p. 6).

3. Depending on the type of provisioning:
  - Automatic: configure the provisioning settings (p. 7).
  - Manual: configure the customer mapping (p. 7).

## 4.2 Billing (Prepaid)

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

### ***To set up billing***

1. Configure the product mapping (p. 5).
2. Create a contract (p. 6).
3. Configure the customer mapping (p. 7).

## 4.3 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 (p. 8).
2. Configure customer mapping (p. 7).

# 5 Configuring integration

## 5.1 Configuring the product mapping

### ***To configure product mapping***

1. Open the **Billing and provisioning** tab.
2. Select the **Enable** check box.
3. 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 **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.

#### 4. Click **Apply**.

AUTOTASK PSA | LOG IN | **BILLING AND PROVISIONING** | CUSTOMER MAPPING | TICKET SYNCHRONIZATION

Enable this page and set up the values that the service will use to create customers and accounts and enable offering items for these customers.

Enable

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Service Mapping

Select the corresponding AutoTask service for each of the offering items.

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Backup & Disaster Recovery

Data sources

Offering items	Autotask services	Provisioning
Local backup	LocalBackup <input type="button" value="x"/>	<input checked="" type="checkbox"/> Free

Standard Edition	Autotask services	Provisioning
Workstations	qa_wrst <input type="button" value="x"/>	<input type="checkbox"/> Free
Servers	qa_serv <input type="button" value="x"/>	<input checked="" type="checkbox"/> Free

## 5.2 Creating a contract for the backup service

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

If the account is not mapped to a customer within Acronis Cyber Cloud 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 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.

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

## 5.3 Configuring the provisioning settings

### To configure the provisioning settings

1. Go to the **Billing and provisioning** tab. Scroll down and find the **Customer Provisioning** section.
2. Configure the customer provisioning and deprovisioning by changing the settings in the corresponding sections.

For automatic tenant creation, enable the **Automatically create customers for Autotask accounts with assigned offering items** option.

For manual tenant creation, disable the **Automatically create customers for Autotask accounts with assigned offering items** option.

AUTOTASK PSA | LOG IN | **BILLING AND PROVISIONING** | CUSTOMER MAPPING | TICKET SYNCHRONIZATION

### Customer Provisioning

These settings will be used for creating customers and accounts.

Create accounts based on: Account name (dropdown), [Registered customer@acronis.com] (text input)

How to set account password: Define manually (dropdown), [password field], [password field]

Automatically create customers for Autotask accounts with assigned offering items

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### Customer Deprovisioning

Set offering item quotas to zero if an account does not have active services

Disable customer if an account does not have active services for the following number of days: 30

Delete customer if an account does not have active services for the following number of days: 45

Apply

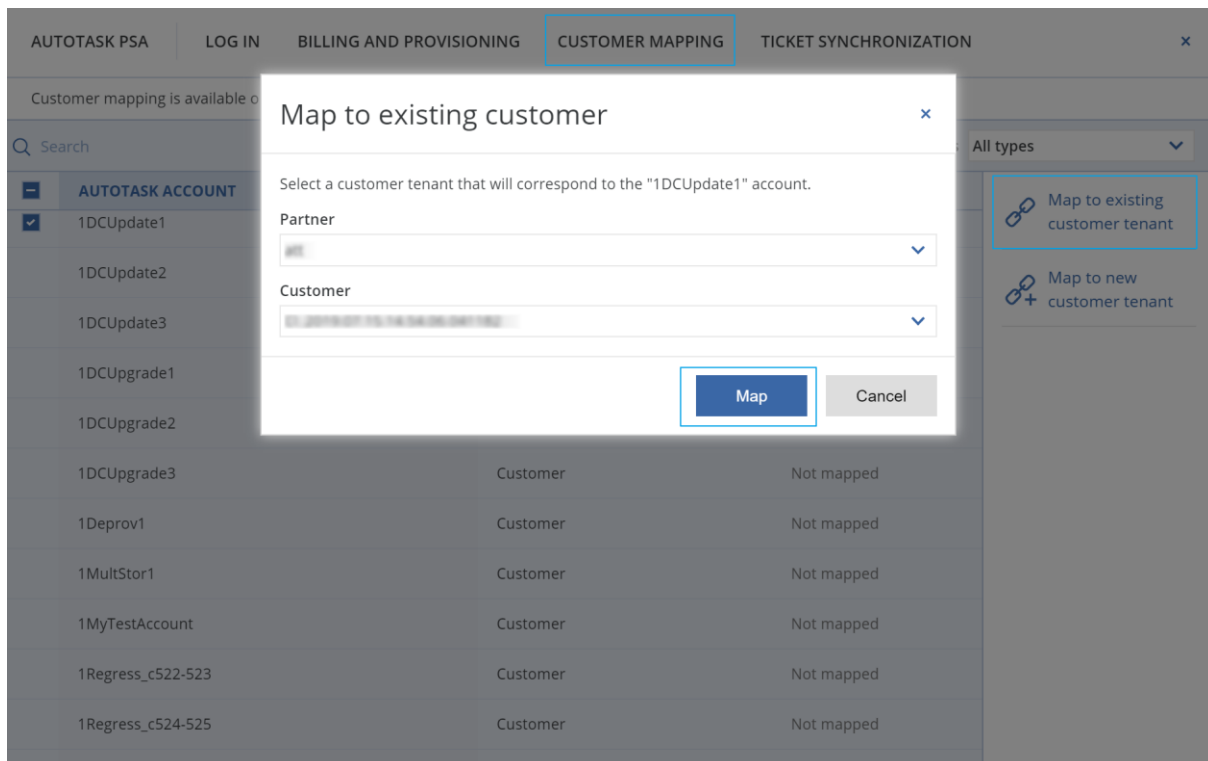
The synchronization between Acronis Cyber Cloud and Autotask may take up to 15 minutes.

## 5.4 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.
3. Click **Map to existing customer tenant** on the right panel.
4. Select a partner, and then select a customer within this partner.

5. Click **Map**, and then click **Apply**.

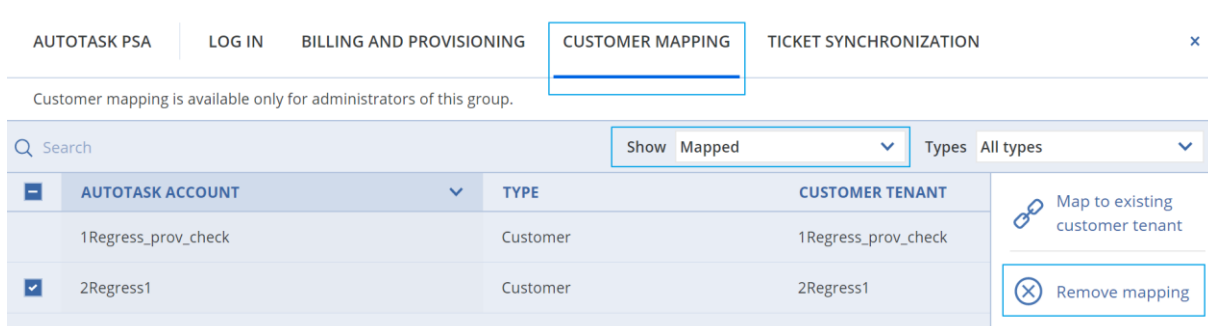


**To map an Autotask account to a new customer within Acronis Cyber Cloud**

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.

## 5.5 Configuring the alert mapping

**To configure the alert mapping**

1. Switch to the **Ticket synchronization** tab.
2. Select the **Enable** check box.



3. In **Source**, select the source for all tickets that will be created based on customer alerts.
4. Set the **Note Type** and **Note Publish** values for all tickets that will be created based on customer alerts.
5. Configure the parameters for each of the customer alerts.
6. [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 the **Create new ticket for an alert if the initial ticket is closed for the following number of days** check box, and then specify the number of days. Otherwise, the initial ticket will be re-opened on every occurrence of the alert.
7. [Optional] If you want to automatically close tickets that originated from alerts when issues that generated these alerts are resolved, select the **Enable auto-closing of tickets with status** check box, and then select the status that will be assigned to a closed ticket in Autotask.
8. Click **Apply**.

AUTOTASK PSA | LOG IN | BILLING AND PROVISIONING | CUSTOMER MAPPING | **TICKET SYNCHRONIZATION**

Map customer alerts to Autotask PSA tickets.

Enable

Create new ticket for an alert if the initial ticket is closed for the following number of days:

Enable auto-closing of tickets with status:

Source:  Note Type:  Note Publish:

CUSTOMER	AUTOTASK				
Alerts	Queue	Type	Status	Priority	Due date (days)
<input checked="" type="checkbox"/> Active Protection service is not running	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Agent is outdated	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Backup failed	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Backup is corrupted	<input type="text" value="Client Portal"/>	<input type="text" value="Service Request"/>	<input type="text" value="New"/>	<input type="text" value="Critical"/>	<input type="text" value="3"/>

## 5.6 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**.