Setting Up a New ConnectWise Manage Integration

https://campus.barracuda.com/doc/84313725/

About Setting Up a New ConnectWise Manage Integration

To set up a new ConnectWise Manage integration, you must first do the following:

- Download and install the ConnectWise Manage Internet Client from the following location: http://www.connectwise.com/install
- In Barracuda Managed Workplace, you must create a new user with Administrator privileges that will be used exclusively by the ConnectWise Manage integration to send ticket updates back to Barracuda Managed Workplace.

Note: If you have global account policies that require regular password expiry, you must remember to change this account's password to prevent it from being locked out, which will break the integration.

- In ConnectWise Manage, generate Public and Private keys that will be used in the integration process.

To Generate Public and Private Keys in ConnectWise Manage

1. Start **ConnectWise Manage** and log in.
2. Click the **System** icon.
3. Click the **Members** link.
4. Click the **API Members** tab.
5. Click the **+** button, and create a new member with the Admin role, then click **Save**.
6. Click the Arrow button to go back to the **Member** page.
7. Click the API member you created, then click the **API Keys** tab.
8. Click the **+** icon.
9. Type a description for the Key.
10. Click the **Save** icon.
11. Copy the Public Key and Private Key and keep them where you can find them.

Note: The Private Key is not available after you leave this page, so it's important for you to copy it.

About Configuring a New ConnectWise Manage PSA Integration

Configure a new Barracuda Managed Workplace-ConnectWise Manage PSA integration by following these procedures in order:

1. Configuring the Integration in ConnectWise Manage

Configuring the Integration in ConnectWise Manage

The following procedures describe how to configure the integration in ConnectWise Manage.

Entering the Service Center Administrator Credentials in ConnectWise Manage

First, in ConnectWise Manage you must enter the login credentials for the Service Center Administrator user that you created in Barracuda Managed Workplace. These credentials will be used exclusively by ConnectWise Manage to send ticket updates back to Barracuda Managed Workplace.

As well, when you set up the credentials you must ensure the ConnectWise Manage asset sync is disabled. Barracuda Managed Workplace is responsible for syncing assets. This means that in order to avoid conflicting asset syncs, you need to disable asset syncing in ConnectWise Manage.

1. Log into ConnectWise Manage PSA using an admin account.
2. Under **Setup**, click **Setup Tables**.
3. Search for and open the Management IT table.
4. Click **New** to create a new Management Solution.
5. In the **Name** field, type *Barracuda Managed Workplace*.
6. From the **Management IT Solution** list, select **Custom**.
7. In the **Custom Solution Name** box, type **SyncOff.**
8. In the **Username** field, type the **Service Center Administrator** user name that was created for **ConnectWise Manage**.
9. In the Password field, type the Service Center Administrator password.
   Note: If this password is set to expire, integration with Barracuda Managed Workplace will need to be updated at that time.
10. Click **Save**.

Configuring the Service Center Connection to the ConnectWise Manage Web Service

You must configure a ConnectWise Manage User Name and Password that will be used exclusively by Service Center to communicate with the ConnectWise Manage Web Service. These credentials are known in ConnectWise Manage as an Integrator Login. If you don't already have an Integrator Login created specifically for Barracuda Managed Workplace, then you can create one in the procedure below.

1. Log into ConnectWise Manage PSA using an admin account.
2. Under **Setup**, click **Setup Tables**.
3. Search for and open the Integrator Login table.
4. Click **New** to create a new user or select an existing user from the table.
5. Type the ConnectWise Manage credentials (Username and Password) that Service Center will use to connect to the ConnectWise Manage web service.
6. To require that any future configuration to the ConnectWise Manage service desk module requires a password re-entry, select the Require password re-entry to configure this service desk module check box.
7. From the **Access Level** list, ensure **All Records** is selected.
8. Ensure the **Service Ticket API** check box is selected.
9. Select the Service Board that you used when Entering the Service Center Administrator Credentials in ConnectWise Manage.
10. Enter the **Ticket Callback URL**, formatted as shown in the example below:
    <SCMessaging URL>/cwcallback.aspx?companyname=<Company ID>&vardomain=<VAR Domain>&host=api-<ConnectWise Website Hostname>&recid=
    For example:
    http://scmessaging.test.mycompany.com/cwcallback.aspx?companyname=HorizontalPlatforms&vardomain=Var1&host=api-myconnectwise.com&recid=
    Note: For ConnectWise Manage 2017.4 and higher, prefix the domain name with "api-". For example, if you log in to ConnectWise Manage with "myconnectwise.com," use "api-myconnectwise.com".
    Tip: In Barracuda Managed Workplace, you can get this URL and copy it into ConnectWise Manage. See Configuring the Ticket Status Mapping.
11. Ensure the following check boxes are selected:
    - **Managed Services API**
    - **Company API**
    - **Reporting API**
    - **System API**
12. Click **Save**.

Configuring Barracuda Managed Workplace SNMP Assets in ConnectWise Manage

You must configure the integration for Barracuda Managed Workplace SNMP assets by following these two procedures:

To create a new Configuration Type for MW SNMP Devices

1. Log into ConnectWise Manage PSA using an admin account.
2. Under **Setup**, click **Setup Tables**.
3. Search for and open the **Configuration** table.
4. Click **Configuration**.
5. Click **New** to create a new Configuration Type.
6. In the **Configuration Type** box, type MW SNMP Devices.
7. Click **Save**.

To create a new Managed Devices Solution name

1. Log into ConnectWise Manage PSA using an admin account.
2. Under **Setup**, click **Setup Tables.**
3. Search for and open the Managed Devices Integration table.
4. Click **New** to create a new item.
5. In the **Name** box, type *MW SNMP* Devices.
6. In the **Solution** box, type Barracuda Managed Workplace.
7. Ensure the Integrator Login is set to the one you've configured for Barracuda Managed Workplace.
8. Click **Save**.
9. Click the **Cross-References** tab.
10. Click **New** to create a new item.
11. In the **Type** box, type **MW SNMP** Devices.
12. From the **Configuration Type** list, select **MW SNMP Devices**.
13. Click **Save**.

Configuring the Integration in Service Center

The following procedure describes how to configure and enable the ConnectWise Manage integration with Barracuda Managed Workplace.

1. [Installing the ConnectWise Manage Service Desk Module](#)
2. [Configuring the Web Service Credentials](#)
3. [Configuring the Setup Table Names](#)
4. [Configuring Asset Synchronization](#)
5. [Configuring the Service Board Mapping](#)
6. [Configuring the Ticket Status Mapping](#)
7. [Configuring Site Company Mapping](#)
8. [Configuring Ticketing Options](#)

Installing the ConnectWise Manage Service Desk Module

The ConnectWise Manage Service Desk Module is available in the Update Center, in Service Center.

Upgrades to the ConnectWise Manage Service Desk Module will be also be available in Update Center. For information on updating an existing ConnectWise Manage installation, see [About Upgrading the ConnectWise Manage Service Desk Module.](#)

1. In Service Center, click **Update Center** > **Components**.
2. Click **Service Desk Modules**.
3. Click **New**.
4. Select the check box beside **ConnectWise Manage Service Desk Module**.

5. Click **Install**.

Configuring the Web Service Credentials

You need to name and describe (if desired) this integration. Then you need to provide the credentials needed for integration.

To complete this procedure, you'll need the Public and Private Keys you generated in the To Generate Public and Private Keys in ConnectWise Manage procedure.

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click the **ConnectWise Manage Service Desk Module** link
3. Modify the **Name** field, if required.
4. In the **Description** field, type a description, if desired.
5. In the **Company ID** field, type your ConnectWise Manage Company ID.
6. In the **Public Key** field, paste the public key you generated in the To Generate Public and Private Keys in ConnectWise Manage procedure.
7. In the **Private Key** field, paste the private key you generated in the To Generate Public and Private Keys in ConnectWise Manage procedure.
8. To require that any future configuration to the ConnectWise Manage service desk module requires a password re-entry, select the **Require password re-entry to configure this service desk module** check box.
9. In the **Website URL**, type the FQDN of your ConnectWise Manage PSA system (for example, https://api-connectwise.com).
    Note: For ConnectWise Manage 2017.4 and higher, prefix the domain name with "api-".
10. Click one of the following:

    ○ **Next**
    ○ **Management Solution Name** on the right sidebar

The Company ID, User Name, Password and Website URL are all validated before you can continue.

Configuring the Setup Table Names

Barracuda Managed Workplace needs to know the Management Solution Name, Managed Devices Configuration Type and Managed Devices Solution name for the integration to work.

1. In the **Management Solution Name** box, type the name.
    To find the Management Solution Name, in ConnectWise Manage go to **Setup Tables** > **Management IT** and locate the name.
    For example, LPI is the Management Solution Name.
2. In the **Managed Devices Configuration Type** box, type the name of the **Managed Devices Solution**.
    If you followed the instructions in Configuring the Integration in ConnectWise Manage, you do not need to change this value. To find the Managed Devices Configuration Type, in ConnectWise

Manage go to **Setup Tables** > **Managed Devices Integration.**
For example, MW SNMP Devices is the Managed Devices Configuration Type.

3. In the **Managed Devices Solution** box, type the name of the Managed Devices Solution.
   If you followed the instructions in [Configuring the Integration in ConnectWise Manage](#), you do not need to change this value. To find the Managed Devices Solution, in ConnectWise Manage go to Setup Tables > Managed Devices Integration.
   For example, Barracuda Managed Workplace is the Managed Devices Solution.
4. Click one of the following:

   - **Next**
   - **Asset Synchronization on the right sidebar**

Configuring Asset Synchronization

On this page, you need to tell Barracuda Managed Workplace when to check for new assets and what to do with the devices that are added or deleted since the last sync. You can also click the Sync Now button to run a sync immediately or click View Log to see the assets collected for a specific sync.

1. From the time popup, select a time or type a time when you want the asset synchronization to run daily.
2. From the **Status for Added Configurations** list, select the status that new configurations will be set to when the corresponding device in Barracuda Managed Workplace is a newly discovered device. Select either **Active** or **Inactive**.
3. From the **Status for Deleted Configurations**, select the status that existing configurations will be set to when the corresponding device in Barracuda Managed Workplace gets deleted. Select either **Active** or **Inactive**.
4. If desired, click **Sync Now** or else the synchronization will start when you click Save. Note that the **Sync** button is enabled when you save the integration.
   Tip: You can view the assets collected from a specific sync by clicking View Log in the Log Viewer section. Logs are deleted automatically after 14 days.
5. Click one of the following:

   - **Next**
   - **Service Boards on the right sidebar**

Important: Use only Active and Inactive in Status for Added Configurations and Status for Deleted Configurations. Editing these status options causes asset synchronization to fail.

Configuring the Service Board Mapping

The Service Boards screen displays all the active service boards in ConnectWise Manage. You must select one default service board that will automatically receive all of the tickets mapped from Barracuda Managed Workplace. You can specify additional service boards to synchronize with Barracuda Managed Workplace. When a ticket is moved from the default service board to one of these service boards, either manually or through an automated workflow, then ticket status updates will continue to be synchronized between Barracuda Managed Workplace and ConnectWise Manage. If

you do not select a service board to map, when a ticket moves to that service board, the ticket status updates between Barracuda Managed Workplace and ConnectWise Manage will no longer occur.

1. In the Is **Default** column, select the option button for the service board that you want to set as the default service board.
2. Select the check box beside each additional service board that you want to map.
3. Click one of the following:

   - **Next**
   - **Ticket Status Mapping** on the right sidebar

Configuring the Ticket Status Mapping

ConnectWise Manage and Barracuda Managed Workplace both allow you to apply a status to a service ticket. Because each system uses different terminology, you must map equivalent status descriptions between systems. See [Entering the Service Center Administrator Credentials in ConnectWise Manage](#) for the equivalent steps required in ConnectWise Manage.

Ticket status mapping between ConnectWise Manage and Barracuda Managed Workplace is two-way, which means that for each service board that you selected in the previous step, you can select the appropriate ConnectWise Manage service ticket status for ticket updates from Barracuda Managed Workplace, and you can select the appropriate Barracuda Managed Workplace ticket status for service ticket updates from ConnectWise Manage. This two-way mapping allows you to control how statuses are mapped when the number of statuses between the two systems is inconsistent. It is strongly recommended that you maintain consistency in status mappings between the two systems.

1. In the first service board displayed in the Barracuda Managed Workplace to ConnectWise Manage Ticket Status Mapping area, for each Barracuda Managed Workplace ticket status, select a corresponding ConnectWise Manage service ticket status.
2. Repeat step 1 for each additional service board in the Barracuda Managed Workplace to ConnectWise Manage Ticket Status Mapping area.
3. In the first service board displayed in the ConnectWise Manage to Barracuda Managed Workplace Ticket Status Mapping area, for each ConnectWise Manage service ticket status, select a corresponding Barracuda Managed Workplace ticket status.
4. Repeat step 3 for each additional service board ConnectWise Manage to Barracuda Managed Workplace Ticket Status Mapping area.
5. Ensure you copy the Ticket Callback URL into ConnectWise Manage. See [Configuring the Service Center Connection to the ConnectWise Manage Web Service](#).
6. Click Next or click Site Company Mapping on the right sidebar.

Configuring Site Company Mapping

In this procedure, you map Barracuda Managed Workplace sites to the corresponding company names in ConnectWise Manage. Do this for each Barracuda Managed Workplace site you maintain.

1. In the **Managed Workplace Site** list, select a site.
2. In the **ConnectWise Manage Company** list, select the corresponding company name.
3. Click the **Link** button.
4. Repeat steps 1-3 until all your sites have been mapped.
5. Click one of the following:

   - •**Next**
   - •**Ticketing Options** on the right sidebar

Configuring Ticketing Options

You can configure what alerts from Barracuda Managed Workplace get sent to ConnectWise Manage.

1. By default, all tickets are sent. You can filter the tickets that are sent by clearing the check box beside any of the following:
   - To exclude site-based tickets, you can clear the **All site-based tickets** check box, or you can click the + icon beside this check box, and clear any of the following: **Manual tickets**, **Site not communicating**, **Loss of monitoring protocol**, and **New device tickets**.
   - To exclude website-based tickets, clear the **All website-based tickets** check box.
   - To exclude all device-based tickets, clear the **All device-based tickets** check box.
   - To exclude device-level monitor tickets, click the + icon beside the **All device-based tickets** check box to expand it, and then clear the **Device-level monitor tickets** check box.
   - To filter policy module tickets, click the + icon beside the **All device- based** tickets check box to expand it, and then select the **Filtered policy modules** option button. Click **Add**, and select the check box that corresponds with each policy module you want to add. Click **Apply**.
   - To filter policy set tickets, click the + icon beside the **All device-based tickets** check box to expand it, and then select the **Filtered policy sets option** button. Click **Add**, and select the check box that corresponds with each policy set you want to add. Click **Apply**.
2. Click **Save**.

This completes the basic Barracuda Managed Workplace-ConnectWise Manage integration that is possible without the MSP Add-on. If you have purchased the MSP Add-on, use the documentation provided by ConnectWise Manage to configure the deeper integration that the MSP Add-on makes possible.