

Autotask Service Desk Module

<https://campus.barracuda.com/doc/88113911/>

Barracuda Managed Workplace pushes asset information to Autotask. When a ticket is created in Barracuda Managed Workplace as the result of an alert being triggered or when you manually create a ticket in Barracuda Managed Workplace, a ticket will also be created in Autotask. Once created, any updates to the status of the ticket made in either system will be synchronized with the other. Similarly, when the ticket is closed in Autotask, the corresponding alert will be cleared and the corresponding trouble ticket closed in Service Center.

The Autotask connector allows you to:

- synchronize information between systems for all discovered devices, including those that support WMI and/or SNMP management protocols;
- easily configure bi-directional synchronization of ticketing;
- synchronize asset details for all devices;
- define the criteria that determines which trouble tickets to send to Autotask.

The following table lists the Service Center asset information fields and their corresponding Autotask asset fields. You can use this table as a reference for synchronizing information about discovered devices between the two systems:

Service Center	Autotask
Display Name	Reference Title
Custom Warranty > Vendor Warranty	Warranty Expiration
Date Discovered	Installed On
Asset Tag	Serial Number
Notes	Notes
Location	Location
Model	Product
Description	Barracuda Managed Workplace Device Description
Inventory Tag	Barracuda Managed Workplace Device Inventory Tag

Best Practice: Asset synchronization works based on the mappings outlined in the table above, and updates to asset information occur as per the time defined in the Asset Synchronization Settings page in Service Center. If you currently have information in these fields in Autotask, it will be overwritten with the Service Center asset information fields. Please do not attempt to manually update these fields in Autotask. Instead, you can create additional user-defined fields as required. Because the

asset synchronization process automatically pushes relevant asset information from Barracuda Managed Workplace to Autotask based on the mappings you assign, a manual device reconciliation process is not required as it was with the previous Autotask extension.

Perform the integration by completing the following tasks in order:

1. [Configuring Autotask](#)
2. [Configuring the Integration in Service Center](#)

Configuring Autotask

The following are the steps to configure Autotask:

1. [Creating User-Defined Fields](#)
2. [Disabling the MW Extension](#)
3. [Creating a Workflow Rule](#)
4. [Verify the Workflow Rule Setup](#)
5. [Creating and Configuring Autotask LiveLinks](#)

Creating User-Defined Fields

If you have an existing legacy Autotask integration, some of the required user-defined fields might already exist. Existing user-defined fields with the Field Type set to ATEDataMapping instead of Text (Single Line) do not need to be modified.

The user-defined field names must match the names provided in the procedures below.

To create an account user-defined field

1. Log in to Autotask using an Administrator account.
2. Hover over the **Autotask** icon in the upper left corner, click **Admin > User Defined Fields**.
3. Click the **Companies** tab.
4. Click **New**.
5. In the **Name** box, type *Managed Workplace Site GUID*.
6. From the **Field Type** box, select **Text (Single Line)**.
7. Click **Save & Close**.

To create service ticket user-defined fields

1. Log in to **Autotask** using an Administrator account.
2. Hover over the **Autotask** icon in the upper left corner, click **Admin > User Defined Fields**.
3. Click the **Tickets** tab.
4. Click **New**.

5. In the **Name** box, type *Managed Workplace Ticket ID*.
6. From the **Field Type** list, select Text (Single Line).
7. Click Save & New.
8. In the Name box, type Managed Workplace Var GUID.
9. From the Field Type list, select **Text (Single Line)**.
10. Click **Save & New**.
11. In the **Name** box, type *Managed Workplace Alert Type*.
12. From the **Field Type** list, select **Text (Single Line)**.
13. Click **Save & Close**.

To create configuration item user-defined fields

1. Log in to Autotask using an Administrator account.
2. Hover over the **Autotask** icon in the upper left corner, click **Admin > User Defined Fields**.
3. Click the **Configuration Items** tab.
4. Click **New**.
5. In the **Name** box, type *Managed Workplace Device GUID*.
6. From the **Field Type** list, select **Text (Single Line)**.
7. Click **Save & New**.
8. In the **Name** box, type *Managed Workplace Device Description*.
9. From the **Field Type** list, select **Text (Single Line)**.
10. Click **Save & New**.
11. In the **Name** box, type *Managed Workplace Device IP Address*.
12. From the **Field Type** list, select **Text (Single Line)**.
13. Click **Save & New**.
14. In the **Name** box, type *Managed Workplace Device Inventory Tag*.
15. From the **Field Type** list, select **Text (Single Line)**.
16. Click **Save & New**.
17. In the **Name** box, type *Managed Workplace Device Type*.
18. From the **Field Type** list, select **Text (Single Line)**.
19. Click **Save & New**.
20. In the **Name** box, type *Managed Workplace Device Last Logged On User*.
21. From the **Field Type** list, select **Text (Single Line)**.
22. Click **Save & Close**.

Note: To ensure that user-defined fields are editable when they're imported, click **Autotask > Admin > Features & Settings > Resources/Users (HR) > Security > Protected Data**. Then ensure the following check boxes are enabled:

- **Edit Protected Data**
- **Edit Unprotected Data**

Disabling the MW Extension

Next, you will disable the legacy Autotask integration by disabling the Barracuda Managed Workplace Extension. If you are configuring an Autotask integration for the first time, skip this step.

Note: Newer versions of Autotask may not have a Barracuda Managed Workplace Extension.

1. Log in to Autotask using an Administrator account.
2. Hover over the **Autotask** icon in the upper left corner, then click **Admin**.
3. Click the **Extensions & Integrations** tab.
4. Click **Other Extensions & Tools**, then **Managed Workplace Extension**.
5. Clear any existing Device Discover batches that have not been reconciled by clicking **Clear Batches**.
6. Clear the **Active** check box and all discovery time check boxes.
7. Click the **Options** tab.
8. Clear the **Enable Round-Trip Closure** check box.
9. Click the **Notification** tab.
10. Clear all check boxes.
11. Click **Save**.

Creating a Custom Extension

Next, you will create an extension callout that identifies the SCMessaging URL.

1. Log in to Autotask using an Administrator account.
 2. Hover over the **Autotask** icon in the upper left corner and click **Admin**.
 3. Click the **Extensions & Integrations** tab.
 4. Click **Other Extensions & Tools**, then **Extension Callout (Tickets)**.
 5. Click **New Extension Callout**.
 6. In the **Name** box, type a name to identify Service Center.
 7. Select the **Active** check box.
 8. In the **URL** box, type the SCMessaging URL, with ATCallback.aspx appended. For example, <http://mysc.com/SCMessaging/ATCallback.aspx>.
- Note:** Leave the **Username** and **Password** boxes blank.
9. From the **Ticket User-Defined Field** list, select **Managed Workplace Var GUID**.
 10. From the **HTTP Transport Method** list, select **GET**.
 11. To send email notifications for failures only, select the **Do not generate e-mail notifications unless a failure is detected** check box.
 12. Click the **Notification** tab.
 13. Select the check box for each user you want to receive email notifications.
 14. Click **Save & Close**.

Creating a Workflow Rule

The final step in configuring Autotask is creating a workflow rule and associating it with the extension callout you just created.

1. In the **Autotask** menu, click **Admin > Features & Settings > Application-wide (shared) Features > Workflow Rules**.
2. On the **Service Desk** tab, click **New**.

3. Provide a name and description for the workflow rule.
4. In the **Events** area, select the following check boxes:
 - **Edited by**
 - **Note Added by**
5. For each of the check boxes selected in step 4, ensure that **Anyone** is selected in the associated lists.
6. Scroll down to the **Actions** area, and from the **Then Execute Extension Callout** list, select the callout extension you created.
7. Click **Save & Close**.

Verify the Workflow Rule Setup

Before continuing with the Autotask configuration, it is a good idea to verify that the workflow rule has been associated with the extension callout.

1. Return to the extension callout that you previously set up.
2. Click the **Workflow** tab.
3. Verify that the workflow rule is listed and that it is active.
4. Close the **Extension Callout** window.

Creating and Configuring Autotask LiveLinks

If your legacy Autotask MW Extension included synched LiveLinks, it is recommended that you deactivate them, as they are not recommended in the new integration. To ensure data integrity, the LiveLinks in the upgraded

connector reference the unique site and device GUIDs. To make use of these new identifiers in LiveLinks, you must create two new LiveLinks for sites and devices.

If this is a first-time Autotask integration, you can create LiveLinks for sites and devices. The use of LiveLinks is optional.

To deactivate existing LiveLinks

1. Log in to Autotask using an Administrator account.
2. Hover over the **Autotask** icon in the upper left corner and click **Admin**.
3. Click the **Extensions & Integrations** tab.
4. Click **Autotask Add-Ons**, then **LiveLinks Designer**.
5. Click the LiveLink you want to deactivate.
6. Clear the **Active** check box.
7. Click **Save & Close**.

To add Autotask LiveLinks for sites and devices

Note: To publish LiveLinks successfully, your Autotask setup might require that you add a security account on the Security Levels tab. If you have selected a security account and are still having issues

publishing LiveLinks, please contact Autotask support.

1. Log in to Autotask using an Administrator account.
2. Hover over the **Autotask** icon in the upper left corner and click **Admin**.
3. Click the **Extensions & Integrations** tab.
4. Click **Autotask Add-Ons**, then **LiveLinks Designer**.
5. Click **New**.
6. In the **LiveLink Name** and **Label** boxes, type *MW Device Overview Page (GUID)*.
7. From the **Category** list, select **Managed Services**.
8. In the Base URL box, type the following URL:
<http://mysc.com/sc/WebActions/DeepLink.aspx?TargetArea=DeviceOverview&GoToPage=True&DeviceGuid=>
9. From the **Entity** list, select **Installed Product**.
10. From the LiveLinks Parameters list, select **Configuration Item Managed Workplace Device GUID**.
11. Click **Insert**.
12. Click **Save and Publish**.
Now you will create the LiveLink to use for Managed Workplace sites.
13. In the **LiveLink Name** and **Label** boxes, type *Managed Workplace Site GUID*.
14. In the **Base URL** box, type the following URL:
<http://mysc.com/SC/Default.aspx?GoToPage=Status/Site/Overview.aspx?CustomerGuid=>
15. From the **Category** list, select **Managed Services**.
16. From the **Entity** list, select **Company**.
17. From the **LiveLink Parameters** list, select **Company Managed Workplace Site GUID (UDF)**.
18. Click **Insert**.
19. Click **Save and Publish**.
Now you will create the LiveLink to use for Managed Workplace tickets.
20. In the **LiveLink Name** and **Label** boxes, type *MW Ticket Device Overview Page (GUID)*.
21. From the **Category** list, select **Managed Services**.
22. In the Base URL box, type the following URL:
<http://mysc.com/sc/WebActions/DeepLink.aspx?TargetArea=DeviceOverview&GoToPage=True&DeviceGuid=>
23. From the **Entity** list, select **Ticket**.
24. From the **LiveLink Parameters** list, select **Configuration Item Managed Workplace Device GUID**.
25. Click **Insert**.
26. From the **Category** list, select **Managed Services**.
27. Click **Save and Publish**.

Note: If the link does not get published, click the Security Levels tab, and then select the Systems Administrator check box. Click Save and Close.

Configuring the Integration in Service Center

The following are the steps to configure the integration in Service Center:

1. [Review Networking Requirements](#)
2. [Installing the Autotask Service Desk Module](#)
3. [Completing the Service Desk Configuration](#)
4. [Modifying Web Service Credentials](#)
5. [Updating Site Account Mappings](#)
6. [Modifying Ticket Status Mapping](#)
7. [Modifying Ticket Defaults](#)
8. [Modifying Asset Type Mapping](#)
9. [Modifying Asset Synchronization Settings](#)
10. [Modifying Ticketing Options](#)
11. [Post-Upgrade Clean Up](#)

Networking Requirements

Autotask restricts outbound connection to the following:

- 80 - This port only accepts HTTP
- 443 - This port only accepts HTTPS
- 2610- This port accepts HTTP or HTTPS

This means that your SCMessaging website or virtual directory must run on one of the allowed ports, or else Autotask will not be able to make a successful connection.

Installing the Autotask Service Desk Module

The service desk module that makes the integration with Autotask possible can be installed from the Update Center.

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

Completing the Service Desk Configuration

Ticket status mapping between Autotask and Barracuda Managed Workplace is two-way, which means that you can select the appropriate Autotask ticket status for ticket updates from Barracuda Managed Workplace, and you can select the appropriate Barracuda Managed Workplace ticket status for ticket updates from Autotask. 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 mapping between the two systems.

You can create custom ticket statuses in Barracuda Managed Workplace in addition to the four system statuses, to map to Autotask ticket statuses. For more information, see [Creating Custom Ticket Statuses](#).

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. In the **Name** box, type a name for the Autotask integration.
4. In the **Description** box, type a description of the Autotask integration.
5. In the **User Name** box, type the Autotask user name. The user must have administrator permissions in Autotask.
6. In the **Password** box, type the Autotask password.
7. In the **Website URL**, type the URL for your specific Autotask host.
Note: To find the URL for your Autotask host, go to www.autotask.net, and log in. Your URL will be the text between "https://" and the / character. For example, www17.autotask.net or www20.autotask.net.
8. To require that any future configuration to the Autotask service desk module requires a password re-entry, select the **Require password re-entry to configure this service desk module** check box.
9. Click **Next**.
10. Choose Barracuda Managed Workplace sites to map to Autotask accounts by doing the following:
 - From the **Managed Workplace Sites** list, select a site.
 - From the **Autotask Accounts** list, select an account.
 - Click **Link**.**Note:** The table lists all the mappings you have created so far. You can click Unlink to undo the association between Service Center sites and Autotask accounts, if necessary.
11. Click **Next**.
12. Map ticket statuses by doing the following:
 - For each of the Barracuda Managed Workplace ticket statuses, select an appropriate Autotask ticket status.
 - For each of the Autotask ticket statuses, select an appropriate Barracuda Managed Workplace ticket status.**Note:** In addition to the four standard Barracuda Managed Workplace ticket statuses, there may be custom Barracuda Managed Workplace ticket statuses available for you to map.
13. Click **Next**.
14. In the Ticket Defaults section, do the following:
 - Select a default source from the **Source** list.
 - Select a default priority for tickets from the **Priority** list.
 - Select a default queue for tickets from the **Assigned Queue** list.
 - Select a default work type for tickets from the **Work Type** list.
 - Select a default issue type for tickets from the **Issue Type** list.
 - Select a default sub-issue type for tickets from the **Sub-Issue Type** list.
 - If desired, type numerical values for the number of **Days, Hours and Minutes** to offset

the due date of tickets.

15. Click **Next**.
16. For each Barracuda Managed Workplace asset type, select the corresponding Autotask asset type.
17. Click **Next**.
18. Type in the time you would like to run the daily asset synchronization between Barracuda Managed Workplace and Autotask. Alternatively, use the time picker to select a time.
Note: The **Sync Now** button is not enabled until after the configuration is completed.
19. To view an asset synchronization log file, click a **View Log** link in the **Log File** column. The log file opens as a .txt file.
20. Click **Next**.
21. 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, clear the **All site-based tickets** check box, or click the + icon beside the 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**, then 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**, then select the check box that corresponds with each policy set you want to add. Click **Apply**.
22. Click **Save**.

Modifying Web Service Credentials

If changes to the dedicated integration account's credentials have been made in Autotask, you must update the service desk module configuration in Service Center.

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Modify the **Autotask user name, Password, or Website URL** as required.
4. To require that any future configuration to the Autotask service desk module requires a password re-entry, select the **Require password re-entry to configure this service desk module** check box.
5. Click **Save**.

Updating Site Account Mappings

1. In Service Center, click **Configuration > Service Desks**.

2. Click **Autotask Service Desk Module**.
3. Click **Site Account Mapping**.
4. Choose Barracuda Managed Workplace sites to map to Autotask accounts by doing the following:
 - From the **Managed Workplace Sites** list, select a site.
 - From the **Autotask Accounts** list, select an account.
 - Click **Link**.
5. Click **Save**.

Modifying Ticket Status Mapping

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Click **Ticket Status Mapping**.
4. For each of the Barracuda Managed Workplace ticket statuses, select an appropriate Autotask ticket status.
5. For each of the Autotask ticket statuses, select an appropriate Barracuda Managed Workplace ticket status.
6. Click **Save**.

Modifying Ticket Defaults

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Click **Ticket Defaults**.
4. Modify the ticket defaults by doing any of the following:
 - Change the default source from the **Source** list.
 - Change the default priority for tickets from the **Priority** list.
 - Change the default queue for tickets from the **Assigned Queue** list.
 - Change the default work type for tickets from the **Work Type** list.
 - Change the default issue type for tickets from the **Issue Type** list.
 - Change the default sub-issue type for tickets from the **Sub-Issue Type** list.
 - If desired, type numerical values for the number of **Days**, **Hours** and **Minutes** to offset the due date of tickets.
5. Click **Save**.

Modifying Asset Type Mapping

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Click **Asset Type Mapping** in the right sidebar.
4. For each Barracuda Managed Workplace asset type, select the corresponding Autotask asset type.
5. Click **Save**.

Modifying Asset Synchronization Settings

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Click **Asset Synchronization**.
4. Enter the time you would like to run the daily asset synchronization between Barracuda Managed Workplace and Autotask. Alternatively, use the time picker to select a time.
5. Click **Save**.

Modifying Asset Sync Options

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Click **Asset Sync Options**.
4. Select one of the following options:
 - **Create and update assets**—Creates new assets and updates existing assets on a regular basis.
 - **Create assets only**—Creates new assets, but existing assets are not updated. If you make editing to configuration item fields in Autotask often, you may want to choose this option.
5. Click **Save**.

Modifying Ticketing Options

1. In Service Center, click **Configuration > Service Desks**.
2. Click **Autotask Service Desk Module**.
3. Click **Ticketing Options**.
4. 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**.
5. Click **Save**.

Post-Upgrade Clean Up

Post-Upgrade Clean Up

After completing the Autotask upgrade and testing the new configuration, you can clean up the legacy integration by doing the following:

- delete the old integration in Service Center;
- call Autotask and request that they delete the MW Extension for your Autotask instance.

Note: After you delete the legacy Autotask extension from Barracuda Managed Workplace and from within Autotask, you will not be able to recreate the extension. It is recommended that you only delete the legacy extension after the service desk module has been installed and tested.

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