

## Configuring Autotask

<https://campus.barracuda.com/doc/99618812/>

The following are the steps to configure Autotask:


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### 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** menu 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** menu in the upper left corner , click **Admin > User Defined Fields**.
3. Click the **Companies** tab.
4. Click the **Tickets** tab.
5. Click **New**.
6. In the **Name** box, type *Managed Workplace Ticket ID*.
7. From the **Field Type** list, select Text (Single Line).
8. Click **Save & New**.

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

#### To create configuration item user-defined fields

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

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 RMM Extension. If


you are configuring an Autotask integration for the first time, skip this step.

Newer versions of Autotask may not have a Barracuda RMM Extension.

1. Log in to Autotask using an Administrator account.
2. Hover over the **Autotask** menu 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** menu in the upper left corner , then 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.

#### Notes

For hosted users, your SCMessaging URL is in the following format:

*https://<xx00>.mw-rmm.barracudamsp.com/SCMessaging/ATCallback.aspx*, where <xx00> is the name of the server where your Service Center is hosted, for example, eu02 or us01.

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 **Automation > AutoForms & LiveLinks**.
4. Click **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

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 **Automation > AutoForms & LiveLinks**.
4. Click **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 Barracuda RMM sites.
13. In the **LiveLink Name** and **Label** boxes, type *Barracuda RMM 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 Barracuda RMM 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 Barracuda RMM Device GUID**.

25. Click **Insert**.
26. From the **Category** list, select **Managed Services**.
27. Click **Save and Publish**.

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

## Figures

1. Autotask\_Menu.png
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