
Integrating Autotask Service Desk Ticketing with the Cisco OnPlus Portal

This Application Note provides instructions for configuring Apps settings on the Cisco OnPlus Portal and Autotask application settings so that Autotask Service Desk tickets can be created automatically, based on events and notifications that are generated through the portal. In addition, this section provides instructions for configuring Autotask to display devices discovered via the portal.

Contents

Autotask Version Compatibility	2
Configuring Settings in Autotask	2
Configuring Settings on the Cisco OnPlus Portal	11
Generating a Test Event, Notification, and Service Ticket	16
Verifying Service Ticket Creation in Autotask	18
Suspending Service Ticket Generation for All Customers	19
Automated Ticket Resolution (Device Monitor Events Only)	18
Updating Global Account Information	19
Removing the Autotask App for a Customer	20
Known Issues	20
Where To Go From Here	21

Autotask Version Compatibility

The Cisco OnPlus Portal uses Version 1.5 of the Autotask API.

Autotask supports Internet Explorer 7 or later. If you use another browser, certain parts of the application will be unavailable. For information about Web browser compatibility for Autotask, see [Run the Autotask Web Browser Check, page 2](#).

Configuring Settings in Autotask

The topics in this section describe settings you must configure in Autotask so that Autotask service desk tickets can be created automatically, based on events that are monitored through the Cisco OnPlus Portal.

- [Run the Autotask Web Browser Check, page 2](#)
- [Create a Service Desk Queue for the Portal, page 4](#)
- [Add an Autotask User, page 5](#)
- [Create Workflow Rules to Set Ticket Severity Level, page 5](#)
- [Modify the Workflow Policy for Duplicate Ticket Handling, page 6](#)
- [Check Workflow Policies Settings for Required Fields, page 7](#)
- [Create a Customer Account in Autotask, page 8](#)
- [Configure Required API Information to View Discovered Devices, page 8](#)
- [How to View Device Configuration in Autotask for OnPlus Portal-Discovered Devices, page 10](#)

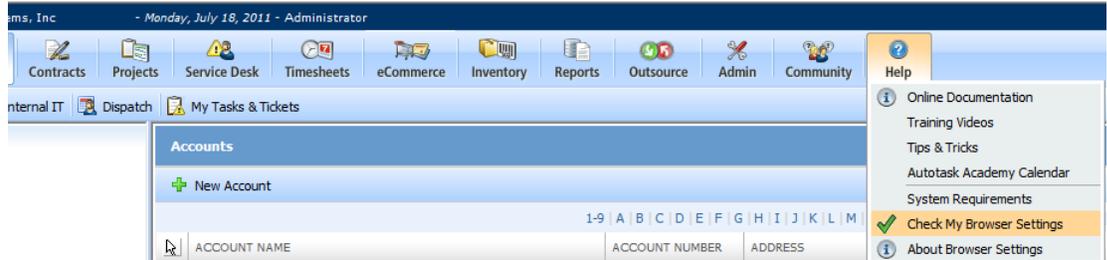
Run the Autotask Web Browser Check

Web browser incompatibilities can result in problems with Autotask setup such as Javascript errors.

To verify that your Web browser settings are compatible with Autotask, follow these steps.

STEP 1 Log in to Autotask.

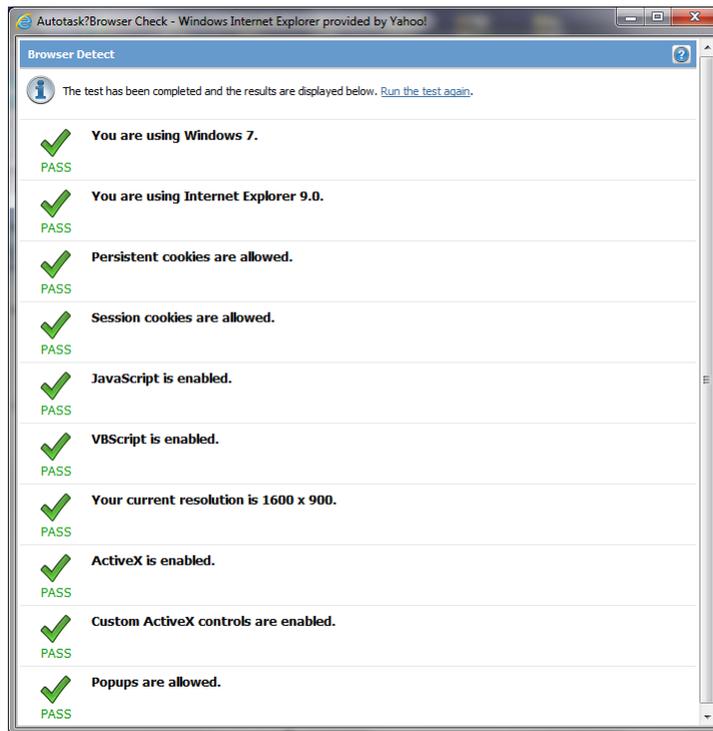
STEP 2 Click **Help > Check My Browser Settings**, as shown below.



STEP 3 Click **Begin Test**.

After the test runs, the results will indicate what must be corrected.

STEP 4 Before continuing, verify that all compatibility checks are Green, as shown below.



Create a Service Desk Queue for the Portal

In Autotask, you must create a Service Desk queue named “OnPlus” and add all users (including the creator of the queue) to the OnPlus queue as Resources. This is required so that the OnPlus queue and its tickets appear on the summary page and the navigation tools in Autotask.

IMPORTANT The Autotask Service Desk queue *must* be named “OnPlus”. If it is not, the integration will not work.

To create a queue in Autotask, follow these steps.

STEP 1 Click the **Admin** icon on the toolbar at the top of the window.

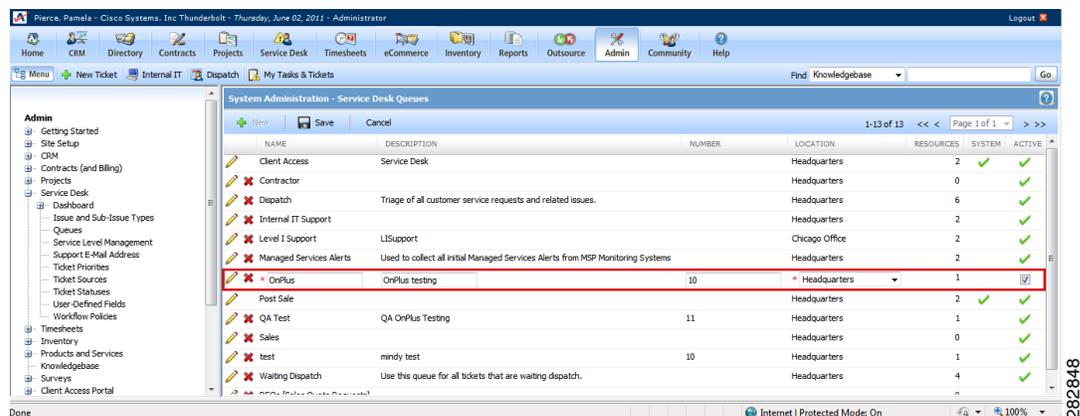


STEP 2 From the Admin menu on the left, choose **Service Desk > Queues**.

STEP 3 Click **New**  to create a queue.

STEP 4 Name the queue **OnPlus**. The queue must be named OnPlus for the integration to work.

STEP 5 Enter a description, and click **Save**.



Add an Autotask User

Next, you must add the Autotask user who will be receiving the tickets generated by the OnPlus portal as a Resource for the OnPlus queue in Autotask. Later, you will associate the same user with the Autotask application configured on the OnPlus portal.

To add a user as a resource, follow these steps:

-
- STEP 1** Right click on the entry for the OnPlus queue you just created and choose **Edit Queue Details**.
 - STEP 2** In the Edit Queue Details dialog box, select the **Resources** tab and click (+) New and add the resource.

All service tickets associated with this user's OnPlus Portal account are created via the API and attached to the OnPlus Service Desk queue.

Create Workflow Rules to Set Ticket Severity Level

In Autotask, you can set the ticket severity level by creating workflow rules using information provided in the Ticket Title or Description fields.

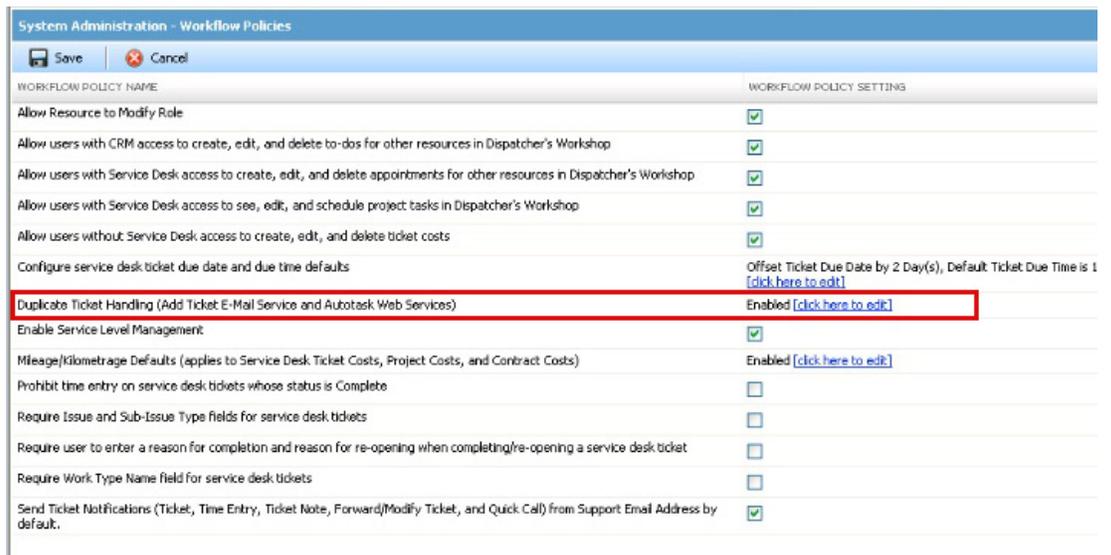
From the Autotask Home page toolbar, select **Help**. From the pull-down menu, click **Online Documentation**. In the **Search** textbox, enter Creating and Editing Workflow Rules.

- NOTE** Ticket Priority categories are fully customizable in Autotask. However, since Autotask does not require a default ticket priority and there is currently an open defect associated with passing ticket priority information through the service integration API, the Cisco OnPlus Portal sets the priority by choosing the Ticket Priority with the highest value.

Modify the Workflow Policy for Duplicate Ticket Handling

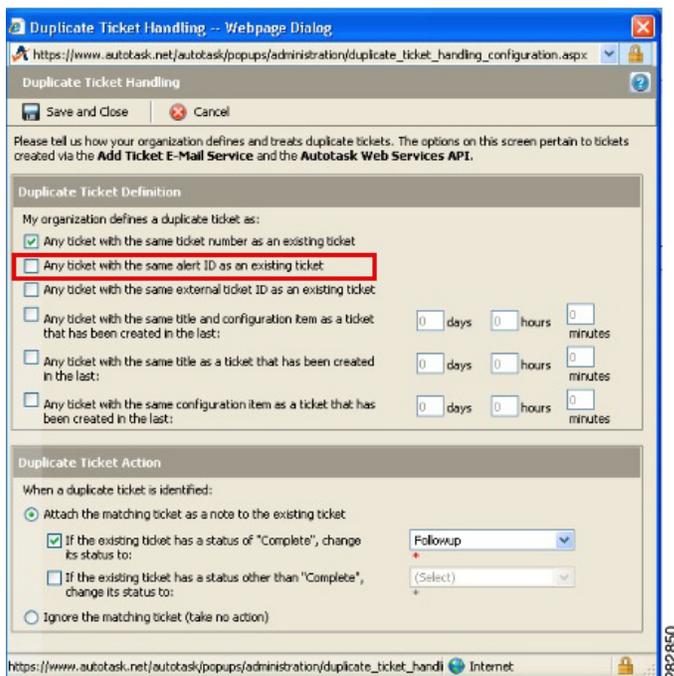
In Autotask, you must also modify the Duplicate Ticket Handling Workflow Policy to only consider a duplicate when the same ticket number is provided.

To access Workflow Policy settings for Duplicate Ticket Handling in Autotask, choose **Admin > Service Desk > Workflow Policies** and use the [\[click here to edit\]](#) link to the right of the Duplicate Ticket Handling option.



WORKFLOW POLICY NAME	WORKFLOW POLICY SETTING
Allow Resource to Modify Role	<input checked="" type="checkbox"/>
Allow users with CRM access to create, edit, and delete to-dos for other resources in Dispatcher's Workshop	<input checked="" type="checkbox"/>
Allow users with Service Desk access to create, edit, and delete appointments for other resources in Dispatcher's Workshop	<input checked="" type="checkbox"/>
Allow users with Service Desk access to see, edit, and schedule project tasks in Dispatcher's Workshop	<input checked="" type="checkbox"/>
Allow users without Service Desk access to create, edit, and delete ticket costs	<input checked="" type="checkbox"/>
Configure service desk ticket due date and due time defaults	Offset Ticket Due Date by 2 Day(s), Default Ticket Due Time is 1 [click here to edit]
Duplicate Ticket Handling (Add Ticket E-Mail Service and Autotask Web Services)	Enabled [click here to edit]
Enable Service Level Management	<input checked="" type="checkbox"/>
Mileage/Kilometrage Defaults (applies to Service Desk Ticket Costs, Project Costs, and Contract Costs)	Enabled [click here to edit]
Prohibit time entry on service desk tickets whose status is Complete	<input type="checkbox"/>
Require Issue and Sub-Issue Type fields for service desk tickets	<input type="checkbox"/>
Require user to enter a reason for completion and reason for re-opening when completing/re-opening a service desk ticket	<input type="checkbox"/>
Require Work Type Name field for service desk tickets	<input type="checkbox"/>
Send Ticket Notifications (Ticket, Time Entry, Ticket Note, Forward/Modify Ticket, and Quick Call) from Support Email Address by default.	<input checked="" type="checkbox"/>

In the **Duplicate Ticket Definition** section of the Duplicate Ticket Handling dialog box, un-check the **Any ticket with the same alert ID as an existing ticket** setting.



Check Workflow Policies Settings for Required Fields

If Workflow Policies have been created by your Autotask administrator, you must ensure that additional fields (either standard Autotask fields or custom-created fields) that are marked as required are only required in the application, and not in the Web services API. If you do not do this, Autotask service tickets cannot be created through the OnPlus Portal.

To make sure that fields marked as required through Admin Workflow Policies are only required by the application, go to **Admin > Service Desk > Dashboard > Workflow Policies** and verify that any policies for required fields are specified as **Only required in Autotask application**.

Here are two examples:

- **Require Issue and Sub-Issue Type fields for service desk tickets** must be set to **Only required in Autotask application**.
- **Require Work Type Name field for service desk tickets** must be set to **Only required in Autotask application**.

Application Note

The screenshot shows the Autotask System Administration interface. The top toolbar contains icons for CRM, Directory, Contracts, Projects, Service Desk, Timesheets, Inventory, Reports, Outsourcing, Admin (circled in red and labeled '1.'), Community, and Help. The left sidebar shows a navigation menu with 'Workflow Policies' circled in red and labeled '2.'. The main content area displays the 'System Administration - Workflow Policies' configuration page. A table lists various workflow policy settings. The 'Require Issue and Sub-Issue Type fields for service desk tickets' setting is circled in red and labeled '3.', with a dropdown menu showing 'Only required in Autotask application'.

Create a Customer Account in Autotask

Make sure that you have created an account for your customer in Autotask. To create a new account, choose **Directory > Account** and click the **+ New Account** button.

The account name that you enter in Autotask must match the Account Name you enter when adding the Autotask service in the Cisco OnPlus portal.

Configure Required API Information to View Discovered Devices

Next you must configure Autotask with required API information to view discovered devices in the OnPlus Portal Network.

- STEP 1** Click the **Admin** icon on the toolbar at the top of the window.
- STEP 2** From the Admin menu on the left, choose **Products and Services > Products > Products**.
- STEP 3** From the Product Search window, click **+New**.

NOTE The information entered in the fields for Step 4 must be entered exactly as shown.

STEP 4 From the Product window, enter the following information:

- Product Name: OnPlus Discovered Device
- Product Category: Hardware
- Product Description: This product has been discovered by Cisco OnPlus
- Product Code: Select from the pull-down menu

Click **Save and Close**.

STEP 5 From the Admin menu, choose **User-Defined Fields**.

STEP 6 From the User-Defined Fields - Products window, click **+New**.

NOTE In Steps 7 through 9, you will be adding three User-Defined Fields. Enter the information exactly as it is presented in these steps.

STEP 7 From the User-Defined Fields window, click **+New** and enter the following information:

- Name*: Device PID
- Description: Device Product ID
- Select Text (Single Line) from the **Field Type** pull-down menu, then click **Save & New**.

STEP 8 From the User-Defined Fields window, enter the following information:

- Name*: Device Type
- Select Text (Single Line) from the **Field Type** pull-down menu, then click **Save & New**.

STEP 9 From the User-Defined Fields window, enter the following information:

- Name*: MAC Address
 - Description: Hardware Address
 - Select Text (Single Line) from the **Field Type** pull-down menu, then click **Save and Close**.
-

How to View Device Configuration in Autotask for OnPlus Portal-Discovered Devices

To view configuration information in Autotask for devices discovered through the OnPlus Portal, follow these steps.

- NOTE** OnPlus-discovered devices may take up to three hours to display in the Configuration Items upon adding the Autotask App.
-
- STEP 1** Log in to Autotask.
- STEP 2** From the toolbar, highlight **Directory** and click **Accounts**.
- STEP 3** From the Accounts page, click the Account Name for which you want to view a configuration.
- STEP 4** On the Account Summary page, from the Directory Menu, click **Configuration Items** to display the configuration.
-

Configuring Settings on the Cisco OnPlus Portal

Follow the procedures in this section to configure settings on the Cisco OnPlus Portal to enable integration with Autotask service ticketing:

- [Create a Delivery Contact for Autotask Ticketing](#)
- [Add and Configure the Autotask App on the Portal](#)
- [Create a Delivery Rule for the Customer on the OnPlus Portal](#)

Create a Delivery Contact for Autotask Ticketing

Before you add the Autotask service, you must have a global delivery contact for delivering notifications to Autotask.

- Although you can use an existing global contact, we recommend that you create a contact to use specifically for Autotask ticketing.

The Autotask contact is a global contact that is used for all of your customers that have the Autotask application installed.

- You must create the contact before you add the application and set up notification delivery rules that will use the Autotask contact.

To create a new delivery contact, follow these steps.

STEP 1 Log on to the Cisco OnPlus Portal and choose **Notifications > Delivery Contacts**.

STEP 2 Click **+Add Delivery Contact**.

STEP 3 Complete the required fields.

Application Note

IMPORTANT This only applies for a Partner Account. When creating a delivery contact for Autotask, make sure that the **Customer** field in the Add Delivery Contact dialog box is set to **None** to make it a global contact. There is no **Customer** field for a Customer Account.



Email Address * Alternate Email Address
Customer Preferred Language
* Indicates Required Field

STEP 4 Click **Save**.

Add and Configure the Autotask App on the Portal

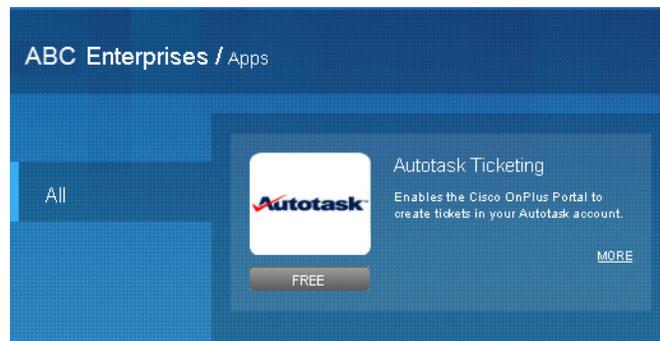
You must add and configure the Autotask application for each customer that you want to be able to generate Autotask Service Desk tickets automatically, based on events and notifications that are generated through the portal.

In this series of steps you will:

- Install the Autotask application to a customer account on the portal
- Associate the Autotask login credentials of the Resource user for the Autotask OnPlus Queue you just created to the delivery contact you created for Autotask on the portal.
- Enter the unique ID for this customer (Account ID).

To add and configure a customer's Autotask application on the Cisco OnPlus portal, follow these steps.

- STEP 1** For a Customer Account, from the Dashboard page on the portal, choose **Apps**.
For a Partner Account, from the Overview page on the portal, choose a customer for which you want to configure Autotask service desk ticketing, and choose **Apps**.
- STEP 2** Click **All** to display the list of applications, locate the **Autotask** application, and click **FREE**.



The **Add App** dialog box appears.

STEP 3 In the **Global Account Information** section of the Add App dialog box:

- Specify the Username and Password for the Autotask Resource user associated with the OnPlus Service Queue.
- In the **Associate with a Contact** section, choose the contact you created for use with the Autotask application.

IMPORTANT For a Partner Account, once you set this Global Account Information for one customer, it is used for all your customers that have the Autotask application enabled.

If you have added the Autotask application previously, click the **Make Changes** option to make the fields editable.

STEP 4 Enter the Account ID in the field provided, if you know it.

NOTE The Account ID is an internal identifier that is not displayed in the Autotask GUI. You can look up the Account ID by performing a lookup on the Company Name.

STEP 5 If you do not know the Autotask Account ID, click **Lookup**.

STEP 6 In the **Account Name** field, enter the account name exactly as it is specified in Autotask. The name is case-sensitive. The name is used to locate the associated Autotask Account ID that is used by the API.

Application Note

The **Account Name** field is pre-populated with the Customer Name specified for this customer on the Cisco OnPlus portal.

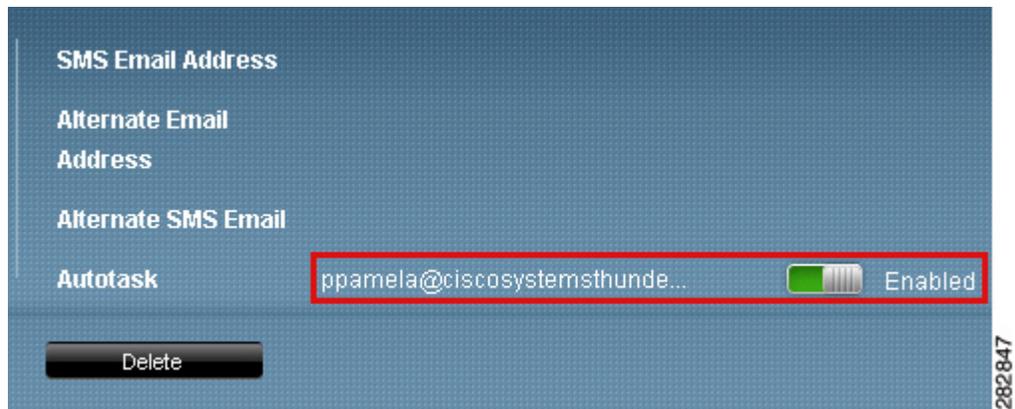
The Autotask account name and account ID pairs that match (or start with) the specified Company Name are displayed.

If needed, use the **Lookup** button again to re-try the search.

STEP 7 Click the **Add** button at the bottom of the window to apply the configuration.

If the application is added successfully, the Autotask application s moved to the Installed section.

The Autotask user credentials are linked to the contact you specified in **STEP 3** above. An Autotask delivery method is added to the contact's information so that you can enable or disable service ticket generation. When you first associate the contact and add the application, it is enabled.



Create a Delivery Rule for the Customer on the OnPlus Portal

To begin creating Service Tickets remotely, you must create a notification delivery rule to specify events that will generate an Autotask service ticket and choose the configured Autotask contact as the target for the delivery rule.

Make sure that you have set up device monitors so that events are generated for the type of conditions that you want to use to create service tickets. For example, you may want to monitor and create tickets for Device Offline events or events with a certain severity level.

Follow these steps when creating notification rules for creating Autotask service desk tickets.

STEP 1 Log in to the Cisco OnPlus Portal and choose **Notifications > Delivery Rules**.

STEP 2 Click the **+ Add Delivery Rule**.

STEP 3 For a Partner Account, choose a customer from the drop-down list.

Note: There is no customer drop-down list for a Customer Account.

STEP 4 Choose a severity level or specify the type of event that will trigger the creation of an Autotask service ticket.

STEP 5 In the **Contact** field, choose the contact that is associated with the Autotask application. If you need to look up the Contact that is used for Autotask, you can open the Autotask configuration details from the Apps page on the Cisco OnPlus portal.

STEP 6 Once you choose the Contact, select the Autotask user from the **Method** drop-down menu. The Autotask user is identified by the format “<username> (Autotask)” in the list.

The following example shows the Autotask user being selected as the Method when creating a delivery rule.

The screenshot shows the 'Add Delivery Rule' form with the following details:

- Customer:** ABC Enterprises
- Severity:** Notice
- Contact:** Mindy Brown
- Method:** A dropdown menu is open, showing three options:
 - ppamela@ciscosystemsthunc
 - mindy.brown@mymail.com
 - ppamela@ciscosystemsthunderboltdemo.com (Autotask)
- Specify Event:** Unchecked checkbox.

If none of the Methods in the list display in this format, it means that you selected the wrong contact.

STEP 7 Click **Save**.

Generating a Test Event, Notification, and Service Ticket

Follow these steps to:

- Create an example delivery rule
- Associate that rule with your Autotask delivery contact and method.
- Use the Test Monitor feature to generate an event that matches the criteria for event notifications specified in the delivery rule.
- Verify that the event notification was sent to Autotask.

STEP 1 Log in to the Cisco OnPlus Portal, and choose **Notifications > Delivery Rules**.

STEP 2 Click the + **Add Delivery Rule** button.

STEP 3 From the **Customer** drop-down menu, choose All from the drop-down list.

STEP 4 For the **Severity** level, choose **Warning**.

STEP 5 For the **Contact**, choose the Autotask delivery contact.

STEP 6 For the **Method**, choose the delivery method you defined for the Autotask delivery contact.

STEP 7 Click **Save**.

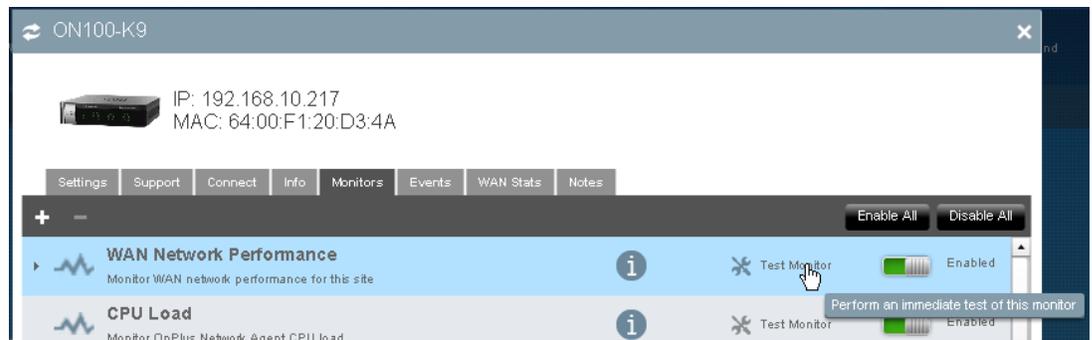
STEP 8 From the Overview menu, click on of your Activated, Online customers with the Autotask application installed.

STEP 9 In the Topology view, locate the customer's OnPlus Network Agent, and open the Device Information window.

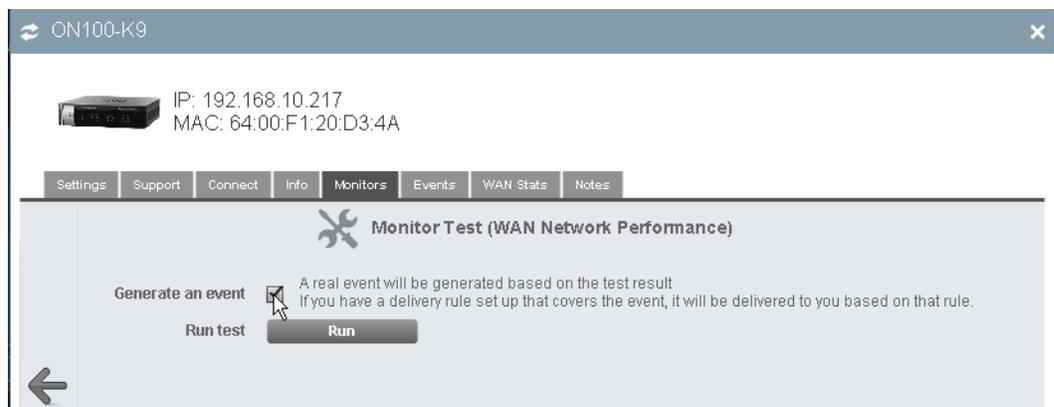
STEP 10 In the Device Information window for the OnPlus Network Agent, click the **Monitors** tab.

The first monitor in the list is the WAN Network Performance monitor.

STEP 11 Click the **Test Monitor** icon to the right of the WAN Network Performance monitor.



STEP 12 Enable the **Generate an event** option.



STEP 13 Click **Run**. The test event will generate a notification because a Warning event is generated by the test (the default severity level of the WAN Network Monitor event is Warning).

STEP 14 After a few minutes, then go back to the Overview page and choose **Notifications > Delivery Rules**.

Application Note

STEP 15 Locate the delivery rule you created for the Autotask test.

The screenshot shows the Cisco OnPlus Portal interface. At the top, there is a navigation bar with 'Overview', 'Notifications', 'Reports', 'Agents', and 'Cisco'. Below this is a breadcrumb trail: 'PartnersPlus / Notifications / Delivery Rules'. A table is displayed with the following columns: Customer, Severity, Event Type, Contact, Method, and Notifications Sent. The first row contains the following data: All, Warning, (All), Claire Jones, ppamela@ciscosystems (Autotask), and 1. A red box highlights the entire first row, and a red arrow points to the number '1' in the Notifications Sent column.

Customer	Severity	Event Type	Contact	Method	Notifications Sent
All	Warning	(All)	Claire Jones	ppamela@ciscosystems (Autotask)	1

Click on the number in the **Notifications Sent** column to see if the test event was generated as expected.

- Check the **Notifications Sent** column to see if the count increased.
- Click on the number in the **Notifications Sent** column to view event details.
- Verify that the test event appears in the list. Since it was just generated, it should be near the top of the list. If it is, then the notification was sent to Autotask.

Verifying Service Ticket Creation in Autotask

If the delivery rule and Autotask information are configured correctly for the customer, when the event occurs and the ticket is successfully created, it appears on the Autotask application under **Service Desk > Queues - All Tickets > OnPlus**.

Automated Ticket Resolution (Device Monitor Events Only)

Autotask service desk tickets that are created through notification delivery rules that are based on device monitors are automatically resolved in Autotask when the device monitor generates a subsequent recovery event. This feature applies to all device monitors except IP Change and WAN Network Performance.

For example, if you have created a notification delivery rule that creates a service desk ticket when the device monitor detects that the monitored host is down, a notification is sent to Autotask, and a service desk ticket is created. If the device subsequently comes back up, the Autotask service ticket associated with that event is automatically marked Complete, and the Resolution field displays the device recovery event information.

Suspending Service Ticket Generation for All Customers

To temporarily suspend generation of service tickets through the portal for all customers, follow these steps:

-
- STEP 1** Log on to the Cisco OnPlus Portal and choose **Notifications > Delivery Contacts**.
 - STEP 2** Select the contact associated with Autotask notification delivery.
 - STEP 3** Click the **Enable** button associated with the Autotask contact to toggle the setting to **Disabled**.

Since the Autotask contact is a global contact for all customers with the application installed, this suspends Autotask ticketing for all customers with the application.

Updating Global Account Information

To update Autotask Global Account Information (Autotask contact or Autotask username and password), follow these steps.

-
- STEP 1** For a Customer Account, from the Dashboard page, choose **Apps**.
For a Partner Account, from the Overview page, select a customer that has the Autotask app enabled, and choose **Apps**.
 - STEP 2** Click **Installed** for a list of Installed applications, locate the Autotask app and click **Edit**.
 - STEP 3** To change Global Account Information, click the **Make Changes** option to make the fields editable.

Application Note

STEP 4 Make your changes.

STEP 5 Click **Update**.

The changes are applied to all customers with the Autotask application installed.

Removing the Autotask App for a Customer

To remove the Autotask app for a specific customer, follow these steps.

STEP 1 For a Customer Account, from the Dashboard page, choose **Apps**.

For a Partner Account, from the Overview page, select the customer, and choose **Apps**.

STEP 2 Click **Installed** for a list of installed apps, locate the Autotask icon, and click **Remove**.

STEP 3 Click **OK** to confirm.

Known Issues

The following known issues apply to Autotask integration with the Cisco OnPlus Portal:

- Some changes that can be made using the Autotask GUI (for example, setting a Ticket Priority level as default) cannot be made through the API.
- When querying the account ID using the API with a partial Company Name, if two or more customers match the given string, only one result is returned (instead of the list of matching results). This means that the agent must enter enough characters to ensure a unique match.

Where To Go From Here

Cisco provides a wide range of resources to help you and your customer obtain the full benefits of the Cisco OnPlus Portal.

Support	
Cisco Small Business Support Community	www.cisco.com/go/smallbizsupport
Cisco Small Business Support and Resources	www.cisco.com/go/smallbizhelp
Phone Support Contacts	www.cisco.com/go/sbsc
Cisco Small Business Firmware Downloads	www.cisco.com/go/software
Documentation	
All technical documentation for the OnPlus Portal and OnPlus Network Agent	www.cisco.com/go/onplus-docs
Cisco OnPlus Product Resources	
Cisco OnPlus product page	www.cisco.com/go/onplus
Cisco Small Business	
Cisco Partner Central for Small Business (Partner Login Required)	www.cisco.com/web/partners/sell/smb
Cisco Small Business Home	www.cisco.com/smb

Cisco and the Cisco logo are trademarks or registered trademarks of Cisco and/or its affiliates in the U.S. and other countries. To view a list of Cisco trademarks, go to this URL: www.cisco.com/go/trademarks. Third-party trademarks mentioned are the property of their respective owners. The use of the word partner does not imply a partnership relationship between Cisco and any other company. (1110R)

© 2012 Cisco Systems, Inc. All rights reserved.

78-20185-03