

Integrating Kaseya with the Cisco OnPlus Portal

This Application Note explains how to configure the integration of OnPlus with Kaseya RMM (Remote Monitoring and Management) so that network events raised in OnPlus are automatically created as tickets in the Kaseya Service Desk with convenient links directly to the affected network device.

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Configuring Settings in Kaseya

Follow the procedures in this section to configure settings within Kaseya to enable integration with the Cisco OnPlus portal for service ticketing:

- [Setting up Kaseya for Users Accessing Kaseya Installed on the Cisco OnPlus Server, page 2](#)
- [Setting up Kaseya for Users with Kaseya Installed on a Local Server, page 3](#)

Setting up Kaseya for Users Accessing Kaseya Installed on the Cisco OnPlus Server

To enable the Kaseya Service Desk using Cisco OnPlus with Kaseya installed on the OnPlus server, follow these steps:

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- STEP 1** Log on to Kaseya.
- STEP 2** From the Kaseya Essentials page, click the down arrow on the green bar on the left side of the screen.
- STEP 3** Click **Kaseya Portal**.
- STEP 4** From the Kaseya Portal, select Support and click **My Tickets**.
- STEP 5** Click the + (plus sign) at the top left side of the page.
- STEP 6** On the New Ticket window, enter the following information:
- Summary - Enable API
 - Description - Please enable web API for integration with Cisco OnPlus
- STEP 7** Click **Save**.

Kaseya will send an email containing a New Ticket notification when the request to enable the API is received. Another email notification will be sent when the API has been enabled.

NOTE Kaseya will set up a default Service Desk that is named Customer_SD_Basic. All tickets will appear in this service desk. You can configure additional service desks by accessing **Service Desk > Desk Configuration**.

Setting up Kaseya for Users with Kaseya Installed on a Local Server

- STEP 1** Log on to Kaseya.
 - STEP 2** From the Kaseya Essentials page, click the down arrow on the green bar on the left side of the screen.
 - STEP 3** Click **System**.
 - STEP 4** Check the **Enable VSA API Web Service** checkbox.
-

Setting Up an Organization in Kaseya for Each Customer

To be able to create Kaseya ticket requests automatically from the OnPlus Portal, you must set up an Organization ID and Organization Name in Kaseya for each of your customers on the Cisco OnPlus Portal for which you want to enable this feature.

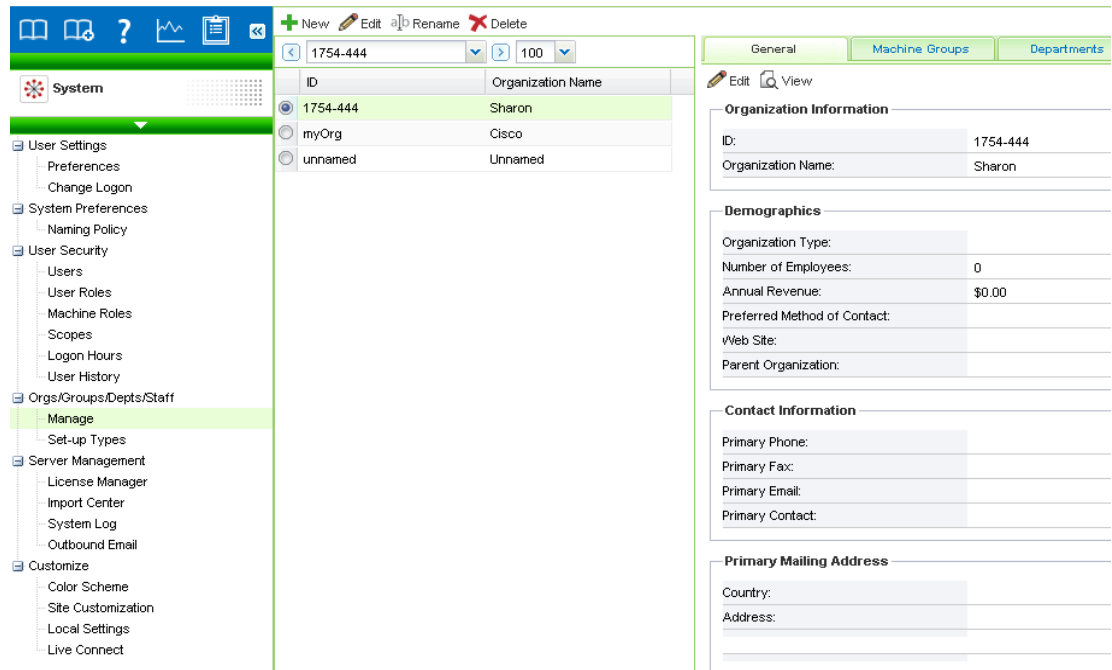
NOTE For customers that installed Kaseya prior to release 7.3, tickets will continue to be generated and displayed as they were before release 7.3 with no data in the Organization Name and Organization ID fields. It is, however, strongly recommended that you set up an Organization ID and Organization Name for each of your customers to take advantage of the organizational, lookup, display, and management benefits offered with Kaseya Service Desk.

For customers installing Kaseya for the first time, setting up Organization information for each of your customers is mandatory. Refer to the Kaseya documentation for more information about this setting.

To create an organization in Kaseya, go to **System > Orgs/Groups/Depts/Staff > Manage** and click **+ New**. To find existing organizations, refer to the list provided on the **Manage** page.

Record the Organization ID for each customer, since you can enter it into the Organization ID field on the portal or you can use the Lookup feature on the Cisco OnPlus Portal.

A sample Kaseya screen, showing the location of the Organization ID field, is shown below.



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 Kaseya for service ticketing:

- [Creating a Delivery Contact for Kaseya Ticketing, page 4](#)
- [Adding and Configuring the Kaseya Service Desk App on the Portal, page 5](#)
- [Creating Delivery Rules for Kaseya Service Desk App, page 8](#)

Creating a Delivery Contact for Kaseya Ticketing

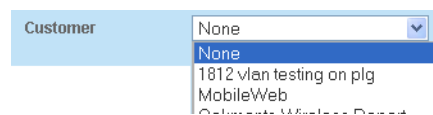
Before you add the Kaseya Service Desk, you must create a global delivery contact to use specifically for Kaseya ticketing.

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

The Kaseya contact is a global contact that is used for all of your customers that have the Kaseya Service Desk installed.

- You should always create the global contact before you add the application and create notification delivery rules that use the contact.
- To create a new global delivery contact, navigate to the Partner Account Overview page and choose **Notification > Delivery Contacts**. Complete the required field and click **Save**.

IMPORTANT When creating a delivery contact for Kaseya, make sure that the Customer field in the Add Delivery Contact dialog is set to None to make it a global contact.

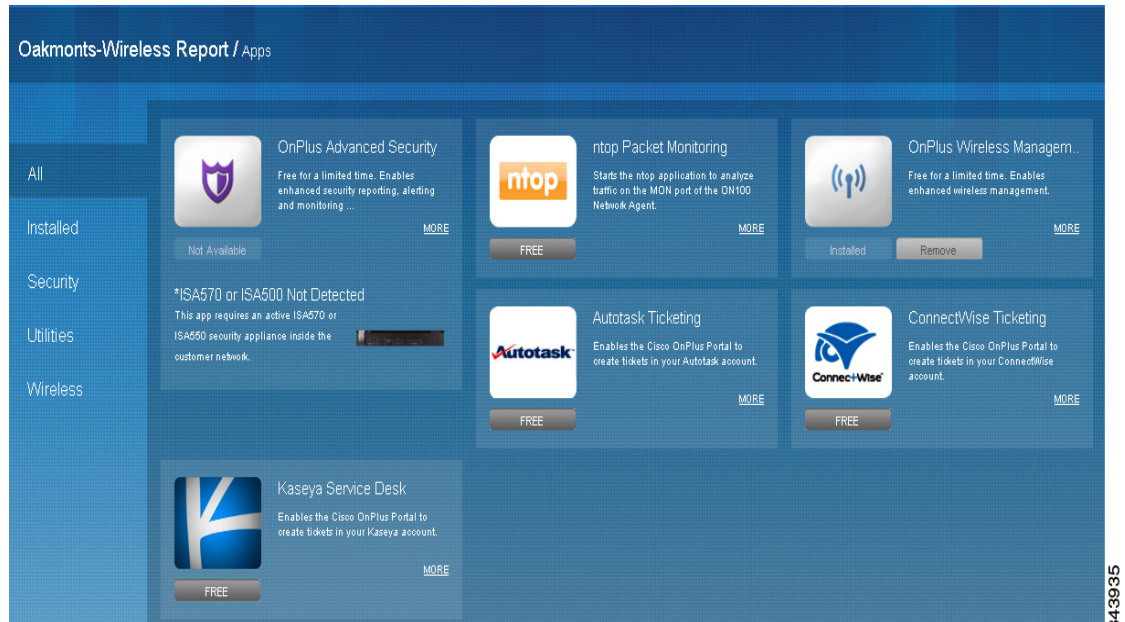


Adding and Configuring the Kaseya Service Desk App on the Portal

To add and configure Kaseya integration for a customer, 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 the Kaseya Service Desk, and choose **Apps**.
- STEP 2** Select **All**, locate Kaseya Service Desk, and click **FREE**.

Application Note



The **Add App** dialog window appears.

The screenshot shows the 'Add App' dialog window for 'Kaseya Service Desk'. The 'Global Account Information' tab is active. It contains two sections: 'Provide the following Kaseya information:' and 'Associate with a Contact'. The first section has fields for Site URL (preview.kaseya.net), Username (shcaswel@cisco.com), and Password (masked). The second section has a 'Contact' dropdown menu showing 'Mark Anderson'. There are 'Add' and 'Cancel' buttons at the bottom. A vertical label '344101' is on the right edge.

STEP 3 In the **Global Account Information** section, enter the following information:

NOTE If you have added the Kaseya Service Desk previously, check the **Make Changes** checkbox to make the fields editable.

- **Site URL:** Kaseya Site URL (for example, test.kaseya.com). This URL is provided by Kaseya.
- **Username, Password:** Kaseya username and password.

These are the credentials you use when logging in to your Kaseya site.

- In the **Associate with a Contact** area, choose a contact to associate with the Kaseya Service Desk on the portal.

Once you have set the **Global Account Information** for one customer, it is used for all customers that have the Kaseya Service Desk enabled.

STEP 4 In the **Organization ID** field, enter the Kaseya Organization ID that you configured in Kaseya (**System > Orgs/Groups/Depts/Staff > Manage**) as shown below or click **Lookup** to obtain the list of Organization Names. When an Organization Name is selected, the associated Organization ID will display.

The screenshot displays the Kaseya Essentials Preview interface. On the left is a navigation menu with categories like System, User Settings, System Preferences, User Security, Orgs/Groups/Depts/Staff, and Server Management. The 'Orgs/Groups/Depts/Staff' section is expanded, showing a 'Manage' option. The main area shows a table of organizations with columns for ID and Organization Name. The first row is selected, showing ID '1754-444' and Organization Name 'Sharon'. To the right is a form for 'Organization Information'. The 'ID' field is highlighted with a red box and contains the value '1754-444'. Below it is the 'Organization Name' field with the value 'Sharon'. Further down is a section titled 'Provide the following Kaseya information:' which includes a 'Lookup' button and a 'Make Changes' checkbox. A red arrow points from the 'ID' field to this section.

STEP 5 Click **Add**.

Application Note

If the application is added successfully, Kaseya appears on the list of **Installed** applications.

The Kaseya user credentials are linked to the contact you specified in the Add App dialog. A Kaseya 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.

Doug Smith dgrsmith2@gmail.com	
First Name	Doug
Last Name	Smith
Email Address	dgrsmith2@gmail.com
Preferred Language	English
<input type="checkbox"/> Disabled	
SMS Email Address	
Alternate Email Address	
Alternate SMS Email	
Kaseya	shcawel
<input checked="" type="checkbox"/> Enabled	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	

Creating Delivery Rules for Kaseya Service Desk App

To begin creating Kaseya Service Tickets remotely, you must create a notification delivery rule. The notification delivery rule lets you select specific OnPlus events, choose the severity level of OnPlus events that will generate a Kaseya service ticket, and choose the configured Kaseya contact as the target for the delivery rule.

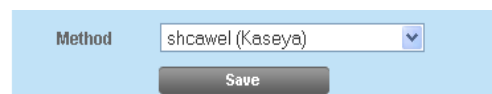
Make sure that you have set up device monitors so that events are generated for the type of conditions that you want to use to create service tickets. By default, only the Cisco OnPlus Network Agent is monitored. For example, you may want to monitor and create tickets for Device Offline events or events of a specific severity level.

Follow these steps when creating notification rules for creating Kaseya service tickets.

-
- STEP 1** Log in to the Cisco OnPlus Portal, and choose **Notifications > Delivery Rules**.
 - STEP 2** Click the **+ Add Delivery Rule** button.
 - STEP 3** Choose a customer from the drop-down list.
 - STEP 4** You can choose a severity level or specify the type of event that will trigger the creation of a Kaseya service ticket.

- STEP 5** In the **Contact** field, choose the contract that is associated with the Kaseya Service Desk. If you need to look up the Contact that is used for Kaseya, you can open the Kaseya configuration details from the Apps page on the portal.
- STEP 6** Once you choose the Contact, select the Kaseya user from the **Method** drop-down menu. The Kaseya user is identified by the format “<username> (Kaseya)” in the list.

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

A screenshot of a web form. It features a label 'Method' to the left of a dropdown menu. The dropdown menu is open, showing a list of options, with 'shcawel (Kaseya)' selected and highlighted. Below the dropdown menu is a 'Save' button.

If none of the Methods in the list display this information, it means that you selected a contact that is not associated with the Kaseya user.

- STEP 7** Click **Save**.

Generating a Test Event, Notification, and Service Ticket

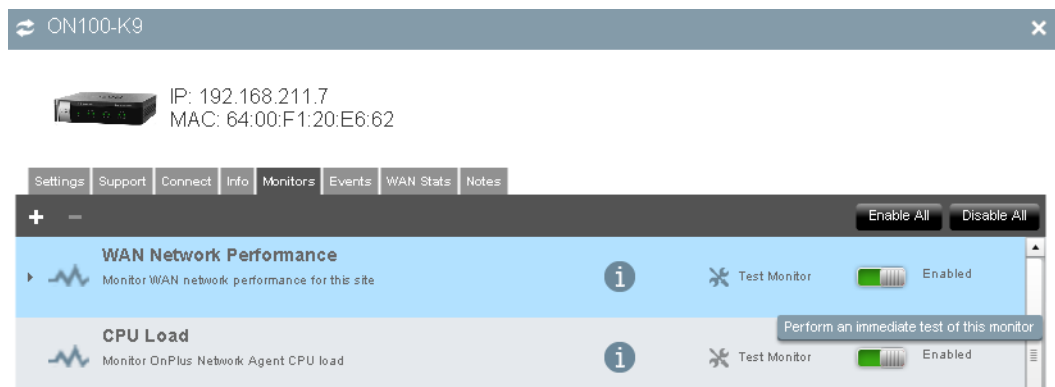
Follow these steps to:

- Create an example delivery rule.
- Associate that rule with your Kaseya 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 Kaseya.

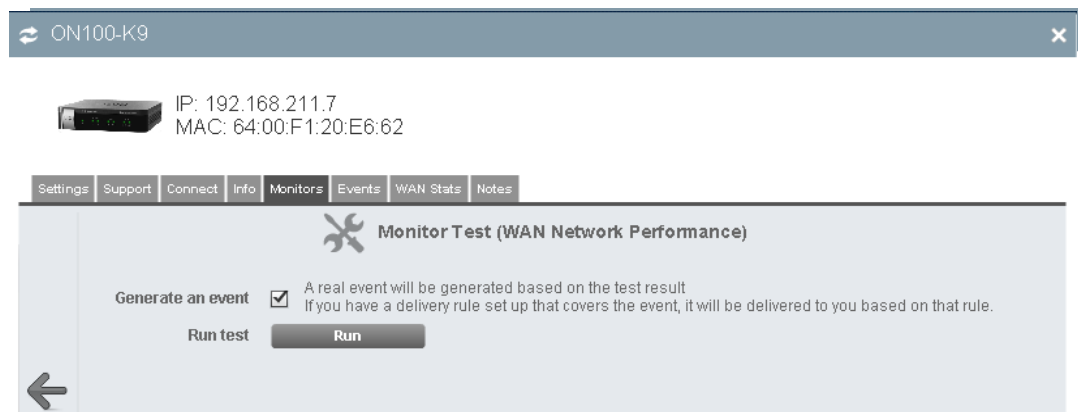
- STEP 1** Log on to the Cisco OnPlus portal and choose **Notifications > Delivery Rules**.
- STEP 2** Click the **+ Add Delivery Rule** button.
- STEP 3** For a Partner Account, from the **Customer** drop-down menu, choose **All** from the Drop-down list.
- Note:** There is no customer drop-down list for a Customer Account.
- STEP 4** For the **Severity** level, choose **Warning**.

Application Note

- STEP 5** For the **Contact**, choose the Kaseya delivery contact.
- STEP 6** For the **Method**, choose the delivery method you defined for the Kaseya delivery contact.
- STEP 7** Click **Save**.
- STEP 8** From the Overview menu, click on one of your Activated Online customers with the Kaseya Service Desk 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.
- 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**.

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

Overview Notifications Reports Agents Cisco						
Cisco / Notifications / Delivery Rules					Customize	+ Add Delivery Rule
Customer ^	Severity	Event Type	Contact	Method	Notifications Sent	Last Sent
PSP-devices-ipv6 - DEBUG ...	Notice	(All)	Clint Doan	clindoan@cisco.com	1100	2012-04-12 15:0
Sanity-IOS-1921	Critical	(All)	Doug Smith	DISABLED - dgrsmith2@gmail.com	0	

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

Verifying OnPlus Ticket Creation in Kaseya

If the delivery rule and Kaseya information are configured correctly for the customer, when the event occurs and the ticket is successfully created, it appears on Kaseya under **Service Desk**.

To verify that tickets are correctly associated with Organizations, go to **Service Desk > Operations > Tickets**. The Organization information is displayed in the Organization column.

To locate tickets that are listed by organization, go to **Service Desk > Operations > Organization Tickets**. Select the organization ID from the list at the top of the page. Make sure you choose one that has associated tickets. The tickets associated with the ID you have selected will display on the lower portion of the page, as shown in the illustrations below.

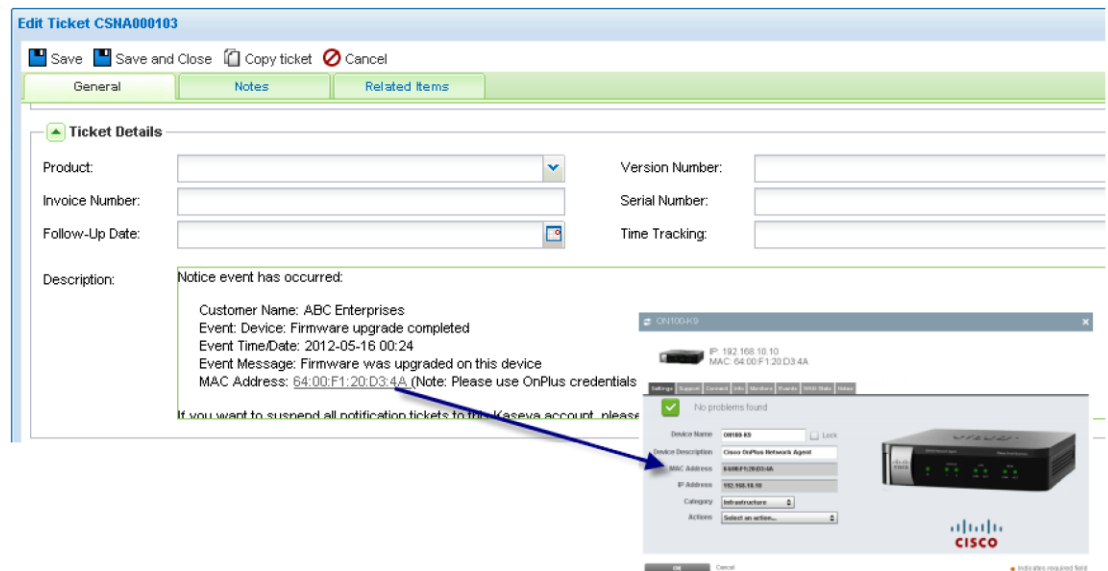
ID	Organization Name	Contact Name	Phone Number	Email Address	Tic...
1754448	seven				0
1754442	Sharon				30
1754444	SharonC				0
unnamed	Unnamed				0
t123	Your Company				11

ID	Summary	Status	Stage	Priority	Seve...	Category	Subcate...	Resolution	Submitter
CSNA000162	OnPlus Notice Alert: Device: Configuration backup on ABC Enterprises	Open	New						shcaswel@cisci
CSNA000161	OnPlus Notice Alert: Device: Configuration backup on ABC Enterprises	Open	New						shcaswel@cisci
CSNA000160	OnPlus Notice Alert: Device: New firmware available on ABC Enterprises	Open	New						shcaswel@cisci
CSNA000159	OnPlus Notice Alert: Device: Firmware upgrade completed on ABC Enterp	Open	New						shcaswel@cisci
CSNA000158	OnPlus Notice Alert: Device: Configuration backup on ABC Enterprises	Open	New						shcaswel@cisci
CSNA000157	OnPlus Notice Alert: Device: Configuration backup on ABC Enterprises	Open	New						shcaswel@cisci

Accessing the Affected Network Device Directly from OnPlus-generated Ticket in Kaseya Service Desk

When the OnPlus generated ticket is opened in Kaseya Service Desk, the user can view more information about the OnPlus network event. Information such as time of the event, event message, hostname of the affected device, and more. The MAC address shown in the ticket information provides a link to the affected device on the Cisco OnPlus Portal. Double click the MAC Address, and if not logged in to the OnPlus portal, you will be prompted to log in to view the OnPlus Device Window.

The OnPlus Device Window provides the user with the ability to view information about the device, remotely connect to the device, update firmware, backup and restore configurations, view and set monitors, view network events history and more.



Suspending Service Ticket Generation for All Customers

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

- STEP 1** Log in to the Cisco OnPlus Portal, choose **Notifications > Delivery Contacts**.
- STEP 2** Select the contact associated with Kaseya notification delivery.
- STEP 3** Click the **Enable** button associated with the Kaseya contact to toggle the setting to **Disable**.

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

Updating Global Account Information

To update Kaseya Global Account Information, follow these steps:

-
- STEP 1** For the Customer Account, from the Dashboard page, choose **Apps**.
For the Partner Account, from the Overview page, select a customer that has the Kaseya Service Desk enabled and choose **Apps**.
- STEP 2** In the **Installed** application list, locate Kaseya Service Desk and click **Edit**.
- STEP 3** From the + Update App page, click the **Make Changes** checkbox.
- STEP 4** Make your changes.
- STEP 5** Click **Update** to apply the changes.
For Partner Accounts the changes are applied to all customers with the Kaseya Service Desk installed.
-

Removing the Kaseya Service Desk for a Customer

To remove Kaseya Service Desk for a specific customer, follow these steps:

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- STEP 1** For a Customer Account, from the Dashboard page, choose **Apps**.
For a Partner Account, from the Partner Account Overview page, select the customer and choose **Apps**.
- STEP 2** In the **Installed** application list, locate the Kaseya Service Desk and click **Remove**.
- STEP 3** Click **OK** to confirm.
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Kaseya Version Compatibility

The Cisco OnPlus Portal uses Version 6.2 of the Kaseya API.

Kaseya recommends the following browsers:

- Windows - Chrome 8 and later
- Mac OS X - Safari 4 and later

Kaseya supports the following browsers:

- Windows - Internet Explorer 8 and 9, Firefox 3.x and later, Chrome 8 and later
- Mac OS X - Safari 4 and later, Firefox 3.x and later, Chrome 8 and later

Kaseya does not support ChromePlus.

Known Issues and Limitations

The following known issue applies to Kaseya integration with the Cisco OnPlus Portal:

- Using Kaseya Service Desk with the Firefox browser may produce unexpected results. For example, when exiting the Service Desk by clicking Logoff, the application may branch to another Kaseya application.

Where To Go From Here

Cisco provides a wide range of resources to help customers 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	
Cisco ON100 Network Agent	www.cisco.com/go/onplus-docs
Cisco OnPlus Portal	www.cisco.com/go/onplus-docs
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

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