Configure Umbrella and ConnectWise PSA Integration

Contents

Introduction

This document describes the configuration of Umbrella and ConnectWise PSA integration.

Overview

The Cisco Umbrella – ConnectWise integration allows MSPs to automate the creation and updating of native ConnectWise configuration instances within their ConnectWise Professional Services Automation (PSA) instance.

These configurations contain custom questions that Umbrella updates daily with service status, efficacy, value reporting data and customer network usage information. These updates include maintenance reports on the usage of Umbrella by your customers, top domains per customer (allowed and blocked) as well as statistics on the number of threats prevented and infections contained.

This guide has four main sections:

- Getting Started – Minimum Requirements
- Integration Features
- ConnectWise Setup Workflow
- Umbrella Setup and Configuration

Getting Started – Minimum Requirements

The table contains the base software requirements for installation:

Software	Version	Hosted Model

Umbrella	Not applicable	Hosted
ConnectWise	2015.1+ Production Release	On Site or Hosted
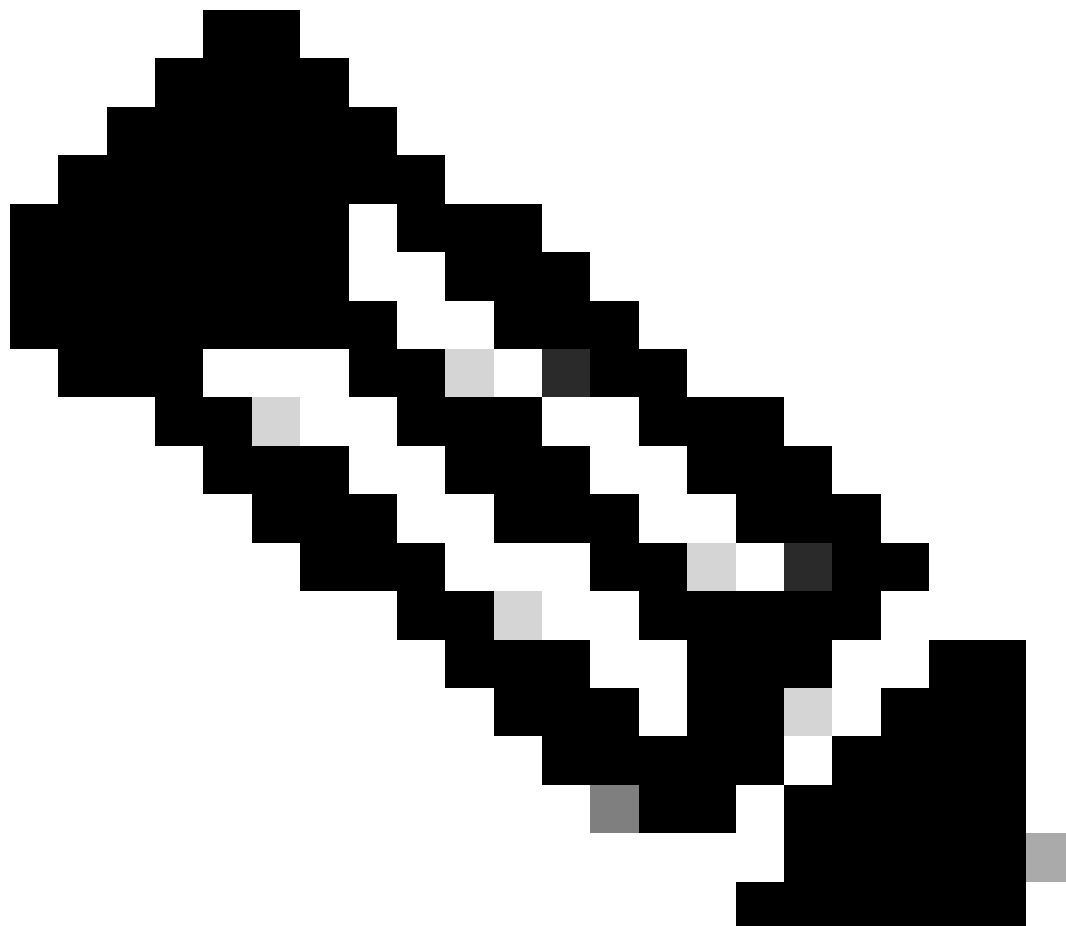
Note: In order to utilize the Umbrella integration, you need administrative access to your ConnectWise desktop client.

Integration Features

The primary features included in the first release of the integration are:

- Create a custom PSA configuration type
- Create a PSA configuration instance for mapped Umbrella organizations
- Synchronize Security Status Metrics and Network Usage Data with ConnectWise PSA

Company Mapping

An MSP administrator enters the ConnectWise Company ID field for each managed customer in the Umbrella for MSPs console to link console defined organizations to their corresponding company within ConnectWise. Any company found in ConnectWise with a matching company ID is utilized as the owner for the newly created or updated Umbrella configuration record.

Configuration Synchronization

Configurations are automatically created by the integration and are kept up to date by the daily synchronization service. A custom "OpenDNS_Umbrella" configuration type is automatically created in your PSA instance during the on-boarding and instances of this configuration is automatically created per mapped company.

All Umbrella data is stored in custom configuration fields in the Umbrella configuration instances (CI).

The table provides an overview of all the configuration question fields currently synchronized by the Umbrella integration.

Field	Description
Organization Id	*Umbrella internal organization ID*
Package	*Umbrella Package*
Seats	*Total number of seats applied to this company*
Networks Total	*Total number of networks applied to this company*
Networks Active (7 Days)	*Total number of active networks in the last seven days*
Networks Inactive (7 Days)	*List of network names inactive in the last seven days*

Roaming Agents Deployed	*Number of Umbrella Roaming agents deployed*
Agents Active (7 Days)	*Number of Umbrella Roaming agents active in the last seven days*
Agents Inactive (7 Days)	*Names of Umbrella Roaming agent identities inactive in the last seven days*
DNS Queries Last Month	*Total number of DNS requests for this company in the previous calendar month*
Malware Infections Prevented Last Month	*Number of sites hosting malware prevented from access in the previous calendar month*
Botnet Infections Contained Last Month	*Number of sites hosting botnet command and control prevented from access in the previous calendar month*
Top Domains Last Month	*List of the names of the most heavily accessed domains in the previous calendar month*
Top Domains Blocked Last Month	*List of the names of the most frequently blocked domains in the previous calendar month*
Top Categories Last Month	*List of content categories most frequently requested in the previous calendar month, including number of requests per category*
Last Updated	*Last time data was pushed to ConnectWise (updated nightly starting at midnight)*

This is an example of a typical configuration:

ConnectWise Setup Workflow

You need to create API Public and Private Keys in ConnectWise for use in the integration. For complete details, please see:

https://support.umbrella.com/hc/en-us/articles/360039095252

Umbrella for MSPs Setup and Configuration

1. Log into Umbrella for MSPs and navigate to **MSP Settings > PSA Integration Details**.
2. Click **Set-up Integration** to open the Integration wizard that you use to tie ConnectWise & Umbrella together.
   The wizard collects information and then tests connectivity with your ConnectWise server. This wizard also allows you to set up ticketing information if you wish to do so, but it is not mandatory to complete the wizard. To read more about ticket integration, click here.
3. In Step 1 of the wizard, select the appropriate PSA (in this case, ConnectWise) then click **Save and Continue**.
4. In Step 2of the wizard, enter credentials so that Umbrella can communicate with your ConnectWise instance. Enter details as required and click **Save and Continue**.

5. If the information entered is correct and if the ConnectWise host is reachable outside your network, you wil advance to step 3 of the wizard.
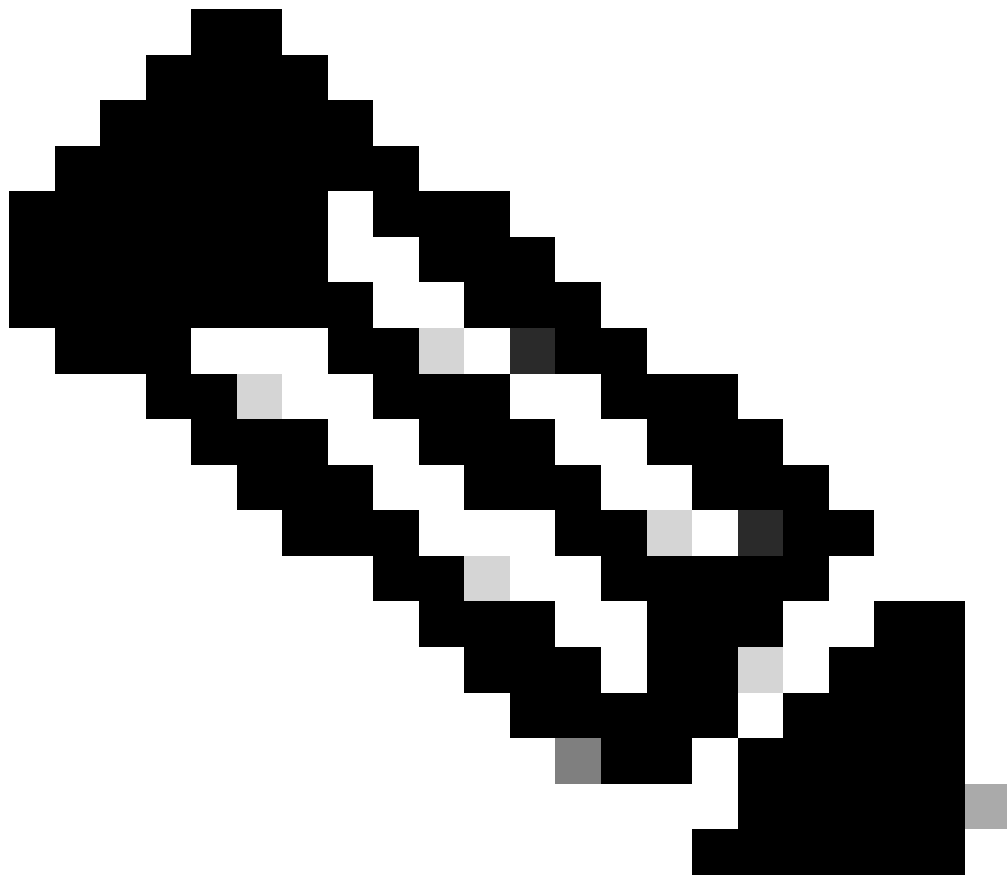
> **Note**: If you get an "Error setting up PSA integration" error message, please double-check that you have entered the correct information and that your host is connectable from outside your network perimeter. The wizard does not proceed until validation of your hostname and API credentials is complete.

As of February 2021, the IP addresses and CIDR ranges that could be used by Umbrella for the PSA Integration are:

54.183.40.98

54.183.86.198

146.112.161.0/24

146.112.163.0/24

6. In Step 3 of the wizard, set up the ticketing for ConnectWise. This step is not mandatory, but if you would like to read more about how to configure ticketing, please read through this article.
7. In Step 4 of the wizard, review your Integration and Ticketing settings, then proceed to map your [Umbrella customer organizations to their ConnectWise Company Ids](#)

Map Companies Between Umbrella for MSPs and Connectwise

In Umbrella for MSPs, under Customer Management, each customer has a PSA ID reference. To configure PSA IDs, navigate to **Customer Management** in the dashboard and then select the customer. You see an editable PSA ID field where you can enter the name of your PSA, which you can find in the CompanyID field. Once configured, the Customer Management list shows you whether the PSA is enabled and the PSA ID.

Data for the integration is updated nightly starting at midnight UTC. Data to reflect the past month (30 days) is initially updated by Umbrella staff when the Organization is created, from that point forward, the monthly data begins on the first of each month.
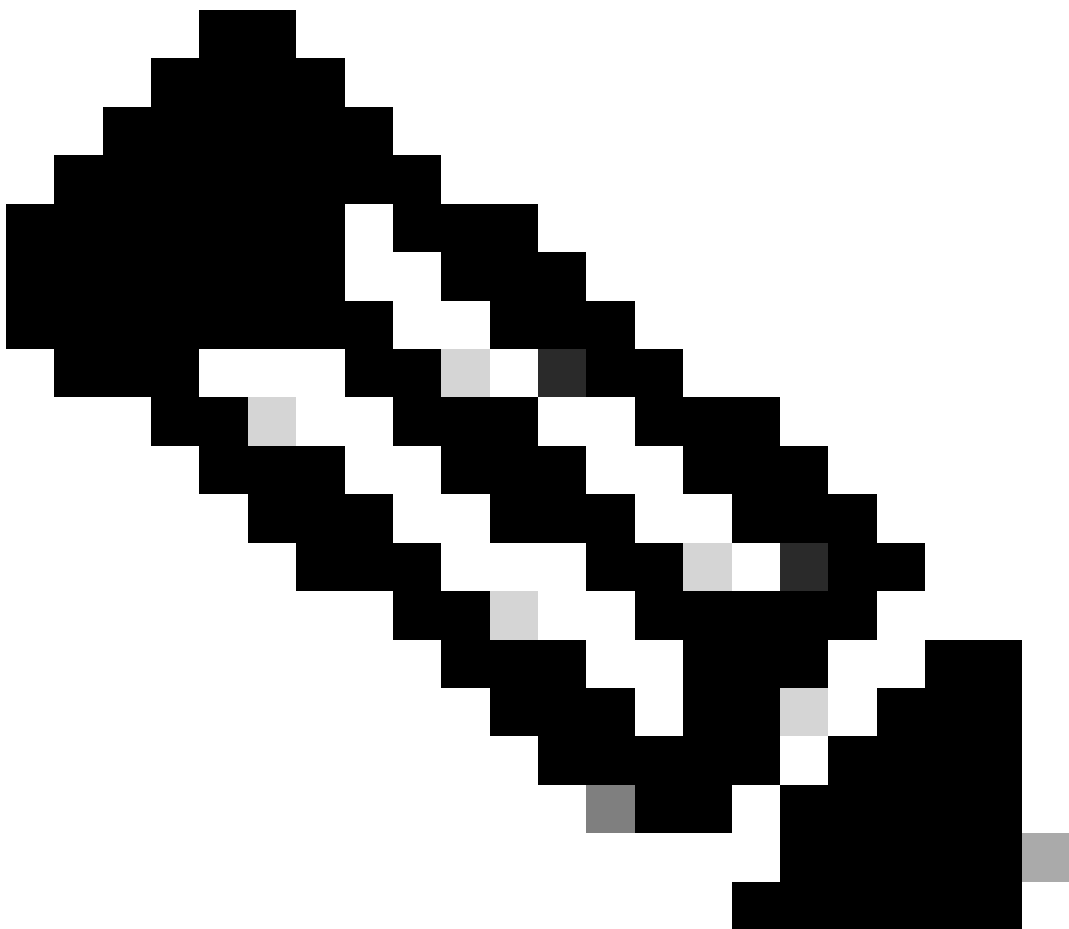
> **Note**: In order to save a PSA ID in Umbrella, it is necessary for the Configuration Status List to have "Active" set to Default in **ConnectWise > System > Setup Tables**.