Kaseya v1 Integration of VSA with Kaseya® BMS™

Configuration Guide

For VSA version 9.3.0.10 or earlier

English

September 15, 2017

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RMM Integration Settings - Kaseya v1

Admin > Service Desk > RMM Integration Settings

> Note: RMM Integration - Kaseya v2 is strongly recommended for both new and existing users of Kaseya® BMS™ and VSA. Existing users of *RMM Integration - Kaseya v1* should upgrade by following the instructions in the RMM Integration - Kaseya v2 - Upgrade topic.

The **RMM Integration Settings** page maintains configuration settings for integrating **Kaseya® BMS™** with a remote monitoring and management (RMM) systems. Once integration is complete you can monitor machines and devices using an integrated RMM and manage their corresponding tickets in **Kaseya® BMS™**.

Kaseya v.1 Integration Summary

Integrating Servers

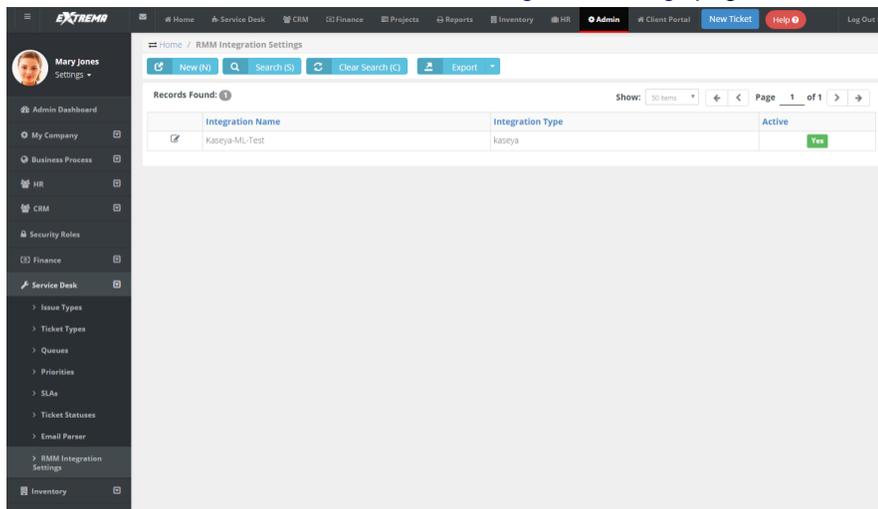Admin > Service Desk > RMM Integration Settings

In this first procedure you integrate your **Kaseya® BMS™** instance with a Kaseya VSA server.

VSA Prerequisites

- Identify the VSA address.
- Create a dedicated VSA user account used by BMS to access the VSA. Example: `BMS_service`
- Ensure ticket creation events in the VSA create tickets in the **Ticketing** module of the VSA.

Procedure

1. Select the Admin > Service Desk > **RMM Integration Settings** page.

2. Click **New**.
3. Enter the following fields in the **General Settings** tab, **Configuration Options** section.
   ➢ **Enable RMM Integration** - `Enable` or `Disable`
   ➢ **Integration Name** - Enter a unique name for this integration.
   ➢ **Integration Type** - `Kaseya`
   ➢ **Integrator Username** - Enter the VSA username BMS uses to access the VSA. This should be a dedicated service account, such as `BMS_service`.
   ➢ **Integrator Password** - Enter the password for the BMS service account.
   ➢ **Server Address (IP-Port)** - Enter the IP address for the VSA.
   ➢ **Callback URL** - Enter the URL used by the VSA to update the BMS, using the following format:

   `https://bms.kaseya.com/KaseyaCallback.aspx?Client=<yourcompanyname+secondword>`

   For example:

   `https://bms.kaseya.com/KaseyaCallback.aspx?Client=kaseya+demo`

4. Click **Save** to save the integration.

Integrating Ticket Settings

`Admin > Service Desk > RMM Integration Settings`

In this procedure you review default ticket settings and map ticket statuses between **Kaseya® BMS™** and the VSA.

1. Select the Admin > Service Desk > **RMM Integration Settings** page.
2. Select the integration record you just created.
3. Optionally change the default values in the **General Settings** tab, **Ticket Defaults** section. All **Kaseya® BMS™** ticket values created from an RMM ticket are initially set to these values. They can be automatically changed—based on the ticket's content—using a **Kaseya® BMS™** workflow.
   ➢ **Priority**
   ➢ **Queue**

> ➢ **Ticket Type**
> ➢ **Ticket Note Type**
> ➢ **Ticket Source**

4. Select the **Ticket Status Mapping** tab.
5. Select values for mapping ticket statuses between **Kaseya® BMS™** and the VSA.
   > ➢ **Ticket Status Mapping From BMS**
   > ➢ **Ticket Status Mapping To BMS**
6. Click **Save** to save the ticket defaults and ticket mapping.
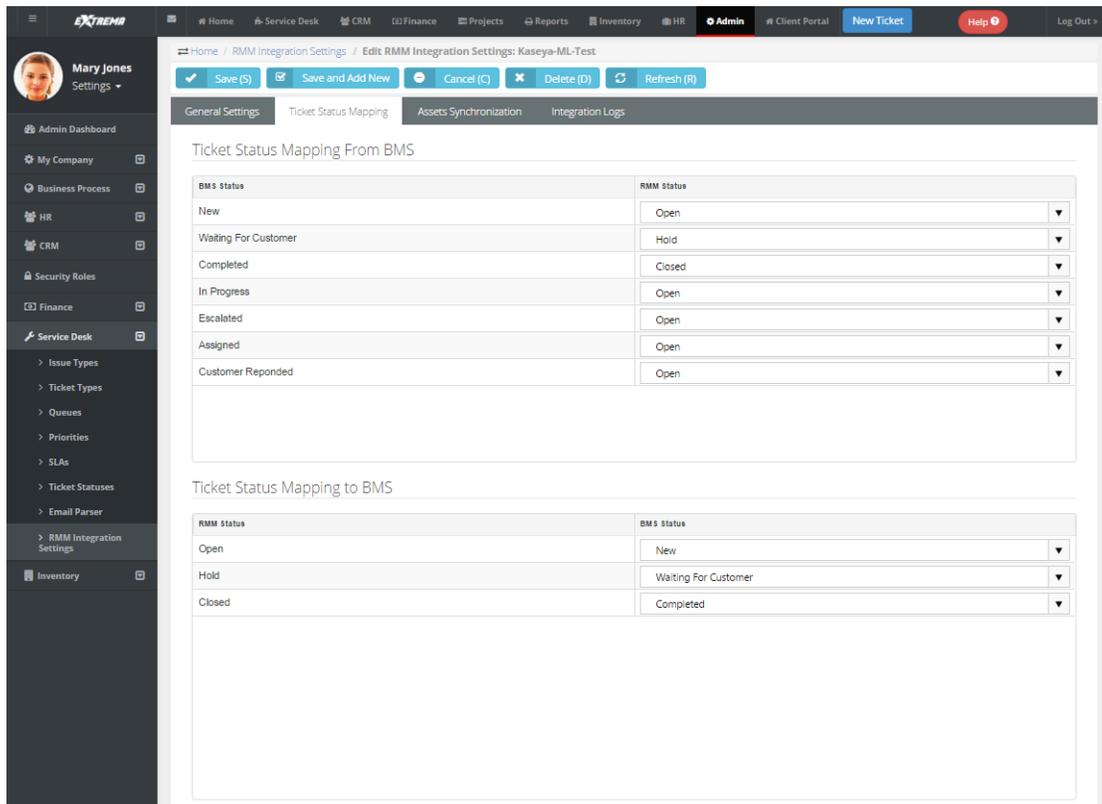
Integrating Customer Accounts and Locations

Admin > Service Desk > RMM Integration Settings

In each **Kaseya® BMS™** customer account you choose to integrate, you must map **Kaseya® BMS™** customer accounts to VSA organizations. You must also map machine groups in each integrated VSA organization to locations in each **Kaseya® BMS™** customer account.

1. Select the CRM > **Accounts** page.
2. Select an account.
3. Click the **RMM Integration** tab.
4. Select the Kaseya **Organization ID** that corresponds to this **Kaseya® BMS™** customer account.
5. Add or edit a location on the **Location** tab.
6. Click the **RMM Integration** tab in the dialog.

7. Select the VSA machine group that corresponds to this **Kaseya® BMS™** location.
8. Repeat steps 5 through 7 for each machine group and location you want to integrate.
9. Click **Save** to save the customer account.
10. Repeat this procedure for each customer account you want to integrate.

Assets Synchronization

Admin > Service Desk > RMM Integration Settings

This procedure provides bulk synchronization. Even if this bulk procedure is not run, asset synchronization occurs automatically *for integrated customer accounts and locations* when:

- A ticket is created for an existing agent.
- A new agent is installed.

Synchronizing Assets

1. Select the Admin > Service Desk > **RMM Integration Settings** page.
2. Click the integration record you created earlier.
3. Select the **Assets Synchronization** tab.
4. Optionally filter the loading of asset data from the VSA into **Kaseya® BMS™** using the **Load Assets** tab.
   - **Machine Group ID**
   - **Group Name**
   - **MAC Address**

> ➢ **IP Address**
> ➢ **First Check In**

5. Click the **Load Assets** button to load asset data from the VSA into **Kaseya® BMS™**.

6. Check the assets you want to import. You can also select the 'select all' checkbox in the upper left hand corner of the table to select all listed assets.

7. Review the **Import Results**.
    - ➢ If the customer account and location is mapped and the asset exists or is added, the import shows success.

➢ If the customer account or location is not mapped, the import shows failure.
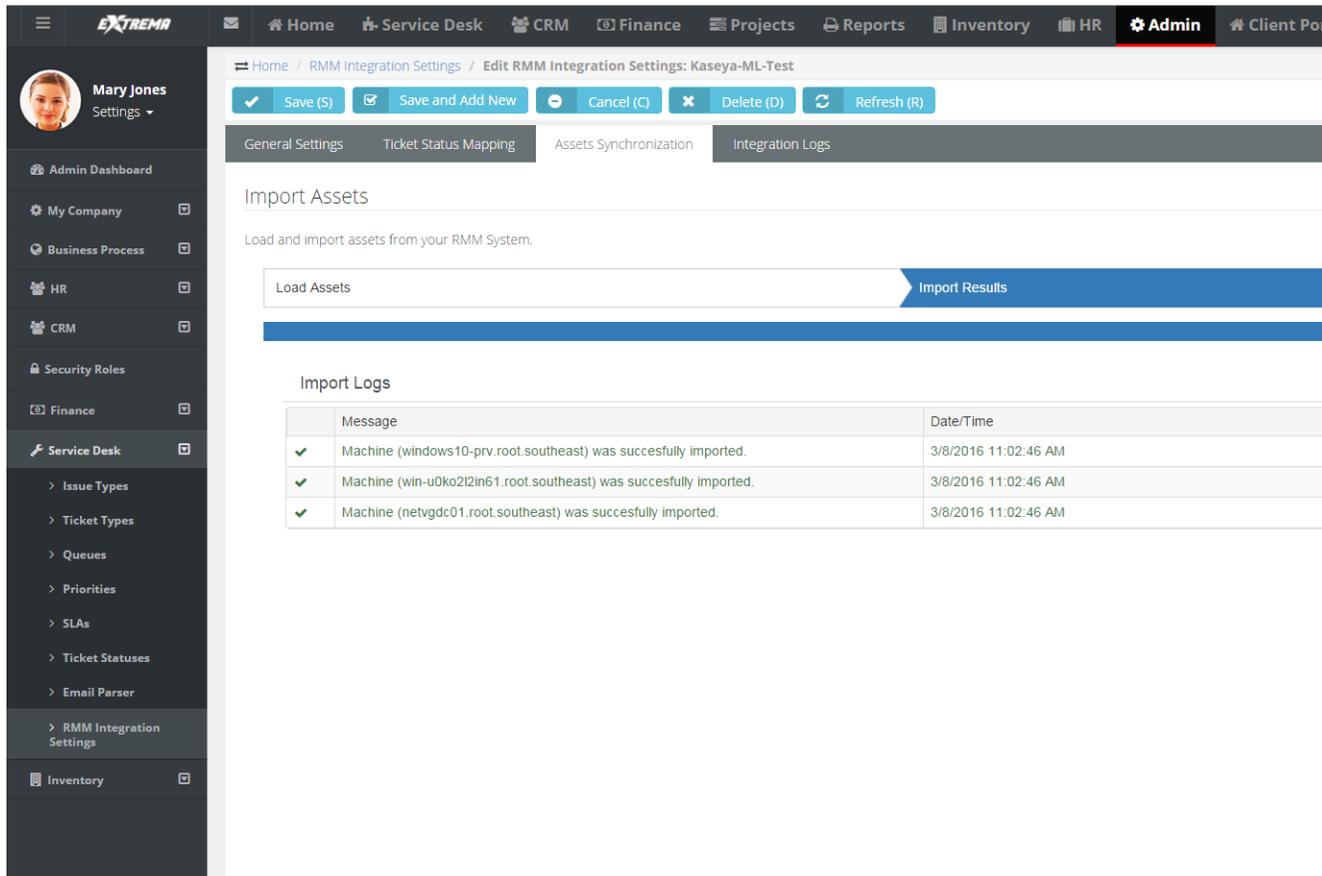
8. Review synchronized asset properties using the BMS > Service Desk > Asset Management > Hardware Assets page.

Testing Ticket Integration

`Admin > Service Desk > RMM Integration Settings`

Once integration is configured, you can test it by triggering a system-generated ticket in the VSA, then view the corresponding ticket in the **Kaseya® BMS™**.

1. In the VSA, use a monitoring event to create a **Ticketing** ticket for an agent in an integrated organization and machine group.
2. In **Kaseya® BMS™** select the Service Desk > Tickets page.
3. Select the **Kaseya® BMS™** ticket created for the VSA monitoring event.

> ➢ The **Ticket View** > Assets section identifies the machine, group and organization of the agent account in the VSA.

4. Select the **RMM Integration** tab.

> ➢ The **Ticket Reference** identifies the ticket in the VSA.