



Vorex™ and Continuum

Integration Guide

Version 4.0.6

English

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RMM Integration Settings - Continuum

The **RMM Integration Settings** page maintains configuration settings for integrating **Vorex™** 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 **Vorex™**. Linked Continuum assets are created in Vorex™ as the tickets are created.

RMM Integration - Continuum integrates **Vorex™** with **Continuum**, a remote monitoring and management (RMM) system. Perform the following procedures to configure and activate integration.

Warning: Do not perform **Step 5 - PSA Integration and Activation** (page 4) until all other steps are completed. Once you enter the **Callback URL** and click **Update**, Continuum will start to send alerts into Vorex™ and the ticket creation process will start.

Continuum Integration Summary

- **Step 1 - Recommended Settings** (page 1)
- **Step 2 - RMM Integration Settings** (page 2)
- **Step 3 - Ticket Status Mapping** (page 3)
- **Step 4 - Account Mapping** (page 3)
- **Step 5 - PSA Integration and Activation** (page 4)

Step 1 - Recommended Settings

Add the following records in Vorex™ to support data provided by Continuum.

Ticket Statuses

Admin > Service Desk Folder > Ticket Statuses

Add the following two statuses.

- Pending
- NOC Completed

Priorities

Admin > Service Desk Folder > Priorities

Add the following priorities.

- Low
- Emergency

Queue

Admin > Service Desk Folder > Queues

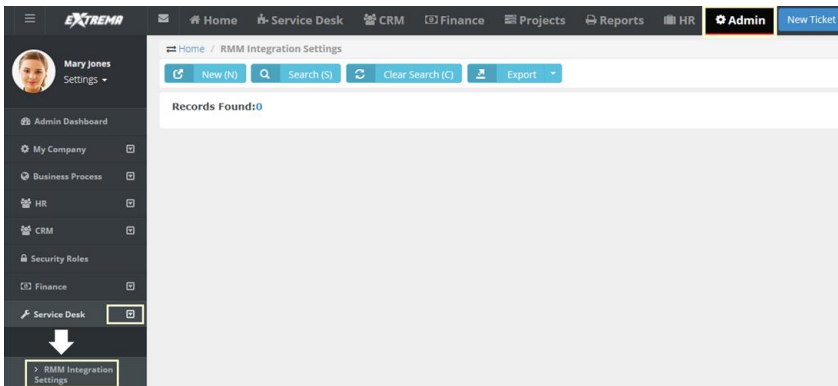
Add the following queue.

- Monitoring Alert Tickets

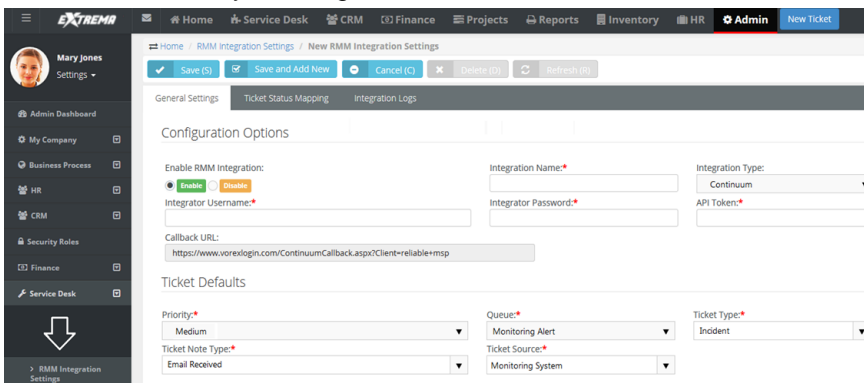
Step 2 - RMM Integration Settings

Add a Continuum integration record in Vorex™.

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

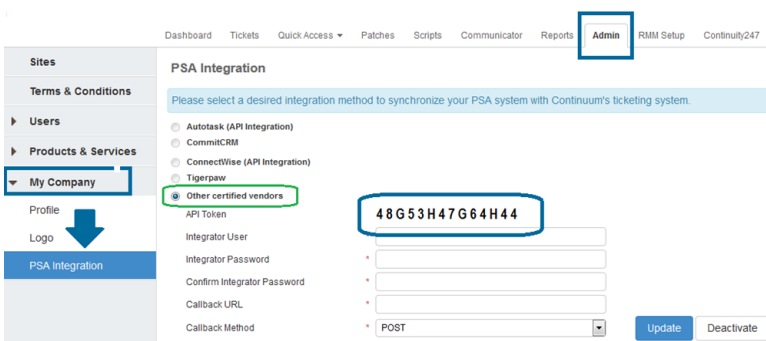


2. Click **New** to create your integration.



3. Enter the following in the General Settings > **Configuration Options** section.
 - **Integration Name** - Enter a name that is easy to understand. You may want to add other integrations later.
 - **Integration Type** - Select **Continuum** from the drop-down list.
 - **Integrator Username** - Create an "integrator username" you will use later to integrate with Continuum.
 - **Integrator Password** - Create an "integrator password".
 - **API Token** - Enter the API token provided by Continuum.

Note: You can identify the API Token in Continuum by navigating to the Admin > My Company > PSA Integration page.



4. In Vorex™, enter the following in the General Settings > **Ticket Defaults** section.
 - **Priority** - Select a default priority.
 - **Queue** - Select the queue you want *tickets created from Continuum monitoring alerts* to be assigned to. For example, *Monitoring Alert Tickets*, if you created that in step 1.
 - **Ticket Type** - Select a default ticket type.
 - **Ticket Note Type** - Select a default note type. *General Notes* is fine.
 - **Ticket Source** - Select a default ticket source. *Monitoring System* is recommended.
5. Click **Save**.

Step 3 - Ticket Status Mapping

Admin > Service Desk > RMM Integration > Continuum Integration > Ticket Status Mapping

In Vorex™:

- Map Continuum ticket statuses to Vorex™ ticket statuses.
- Map Vorex™ ticket statuses to Continuum ticket statuses.

The screenshot shows the 'Ticket Status Mapping' configuration page in Vorex™. The page is divided into two main sections for mapping ticket statuses.

Ticket Status Mapping From: This section maps Vorex statuses to Continuum statuses. A blue arrow points to the 'Ticket Status Mapping From' header.

VOREX STATUS	CONTINUUM
New	New
Waiting For Customer	Waiting Customer
Completed	Closed
Escalated	Approval needed by backoffice
Assigned	Scheduled
In progress	Work in progress by backoffice
Pending	Pending
NOC Completed	Noc completed

Ticket Status Mapping to: This section maps Continuum statuses to Vorex statuses. A green arrow points to the 'Ticket Status Mapping to' header.

CONTINUUM STATUS	VOREX STATUS
New	New
Closed	Completed
Acknowledge	In progress

Step 4 - Account Mapping

1. In Continuum, select the Admin > **Sites** page.

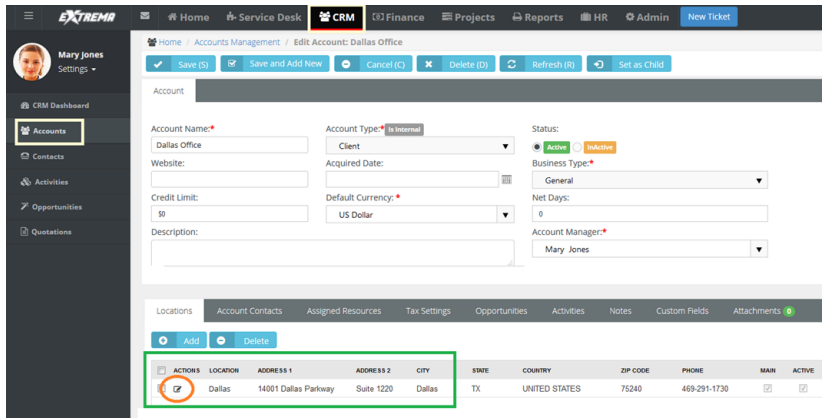
The screenshot shows the 'Sites' page in Continuum. The 'Admin' menu item is highlighted with a green box. The 'Sites' table is displayed below the navigation menu.

Site Name	Site Code	Product
INP Main Office	INPMainOffice	
Dallas Office	DallasOffice	

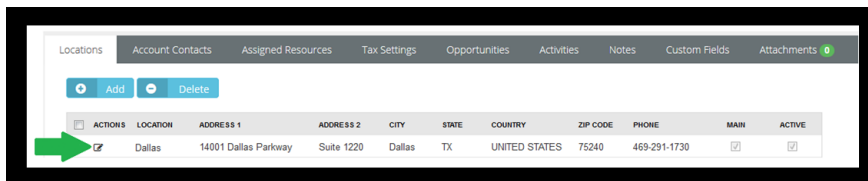
2. Copy the <site_code> value.

RMM Integration Settings - Continuum

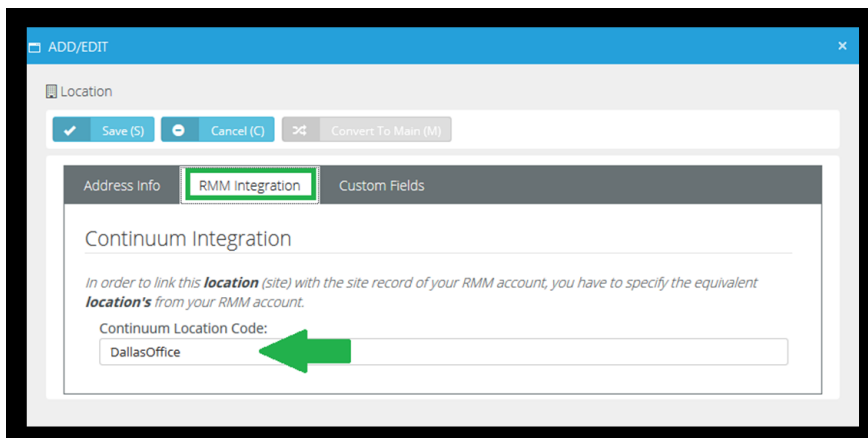
- In Continuum, a site code equals an account in Vorex™.
- 3. In Vorex™, select the CRM > **Accounts** page.
- 4. Open an account that matches the <site_code> information.



- 5. Double-click a **Location** record to edit.
 - The location record should correspond to the <site_code> for this account. You may have several locations defined for this account.



- 6. Click the **RMM Integration** tab.
- 7. Paste the <site_code> into the **Continuum Location Code** field.
- 8. Click **Save**.

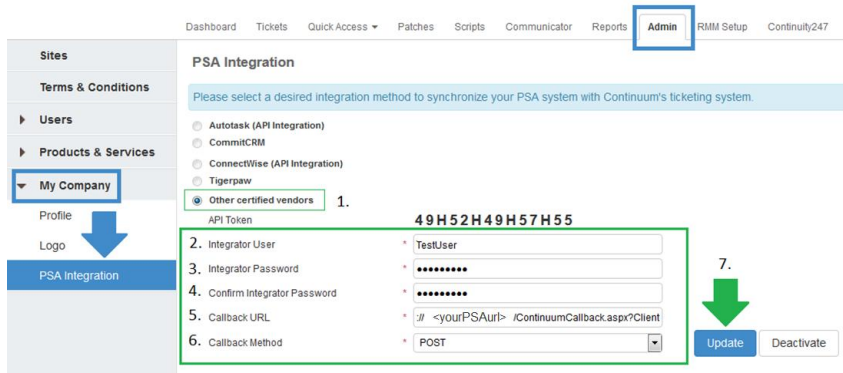


Step 5 - PSA Integration and Activation

Configure Continuum to use Vorex™ as its PSA Integration solution.

Warning: Do not perform this step until all other steps are completed. Once you enter the Callback URL and click Update, Continuum will start to send the alerts into Vorex™ and the ticket creation process will start.

1. In Continuum, select the Admin > My Company > **PSA Integration** page.



2. Select the **Other certified vendors** option.

- **Integrator User** - Enter the **Integrator Username** you specified in **Step 2 - RMM Integration Setup** (page 2).
- **Integrator Password** - Enter the **Integrator Password** you specified in **Step 2 - RMM Integration Setup** (page 2).
- **Confirm Integrator Password** - Re-enter the **Integrator Password**.
- **Callback URL** - Enter a URL similar to the following:
https://bms.kaseya.com/ContinuumCallback.aspx?Client=Company_Name

Note: You can identify the *Callback URL* in Vorex™ by navigating to the *Admin > Service Desk > RMM Integration Settings* page. Open the *RMM Integration Settings* record you created in **Step 2** (page 2) and copy the value in the **Callback URL** field.

- **Callback Method** - Select **POST** from the drop-down list.

3. Click on the **Update** button.

- A ticket originates in Continuum and gets created in Vorex™.
- Linked Continuum assets are created in Vorex™ as the tickets are created.
- Updates to the status and notes of a Vorex™ ticket are posted back to its corresponding ticket in Continuum.
- If a ticket is manually created new in Vorex™ Continuum is not updated.