

# Vorex<sup>™</sup> 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<sup>™</sup>** 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<sup>™</sup>**. Linked Continuum assets are created in Vorex<sup>™</sup> as the tickets are created.

*RMM Integration - Continuum* integrates **Vorex**<sup>™</sup> 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<sup>TM</sup> 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<sup>™</sup> 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<sup>™</sup>.

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

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2. Click New to create your integration.

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- 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.

		Dashboard Tickets Quick	Access - Patches	Scripts	Communicator	Reports	Admin	RMM Setup	Continuity247
	Sites	PSA Integration				L			
	Terms & Conditions	Please select a desired inte	gration method to sy	nchronize y	our PSA system	with Continu	ium's tick	eting system.	
Þ	Users	Autotask (API Integration)							
Þ	Products & Services	CommitCRM ConnectWise (API Integratio	n)						
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		Confirm Integrator Password	i •						
		Callback URL	•						
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- 4. In Vorex<sup>™</sup>, 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<sup>™</sup> ticket statuses.
- Map Vorex<sup>™</sup> ticket statuses to Continuum ticket statuses.



## **Step 4 - Account Mapping**

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

	_	Dashboard	Tickets Quick Access	<ul> <li>Patches</li> </ul>	Scripts Con	imunicator	Reports	Admin	RMM Setup	Continuity247
	Sites	Sites								
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Þ	Products & Services									
	My Company									

2. Copy the <site code> value.

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

= EXTREMA	🔤 🎢 Home 📩 Service Desk	📽 CRM 💿 Finance 🚍		🛍 HR 🌣 Admir	n New Ticket					
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	Account									
2 CRM Dashboard										
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- 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.

	DD/EDIT	×				
	Location					
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	Address Info RMM Integration Custom Fields					
	Continuum Integration					
In order to link this <b>location</b> (site) with the site record of your RMM account, you have to specify the equivalent location's from your RMM account.						
	Continuum Location Code:					

## **Step 5 - PSA Integration and Activation**

Configure Continuum to use Vorex<sup>™</sup> 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<sup>™</sup> and the ticket creation process will start.

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

		Dashboard Tickets Quick Access 🕶	Pa	tches Scripts	Communicator	Reports Ad	min RMM Set	up Continuity247			
	Sites	PSA Integration									
	Terms & Conditions	Please select a desired integration method to synchronize your PSA system with Continuum's ticketing system.									
Þ	Users	Autotask (API Integration)									
÷	Products & Services	CommitCRM     ConnectWise (API Integration)									
-	My Company	Tigerpaw									
	Profile	Other certified vendors		49H52H4	9H57H55		_				
	Logo	2. Integrator User	.*	TestUser			)				
	PSA Integration	3. Integrator Password					7.				
	- continue granteri	4. Confirm Integrator Password	*								
		5. Callback URL		:// <yourpsau< th=""><th>rl&gt; /ContinuumCa</th><th>Ilback.aspx?Client</th><th></th><th></th></yourpsau<>	rl> /ContinuumCa	Ilback.aspx?Client					
		6. Callback Method		POST		•	Updat	e Deactivate			

- 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<sup>TM</sup> 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<sup>™</sup>.
  - > Linked Continuum assets are created in Vorex<sup>™</sup> as the tickets are created.
  - ➤ Updates to the status and notes of a Vorex<sup>™</sup> ticket are posted back to its corresponding ticket in Continuum.
  - ➤ If a ticket is manually created new in Vorex<sup>™</sup> Continuum is not updated.