



Kaseya v1 Integration of VSA with Vorex™

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 Vorex™ 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 **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™**.

Kaseya v.1 Integration Summary

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Integrating Servers

Admin > Service Desk > RMM Integration Settings

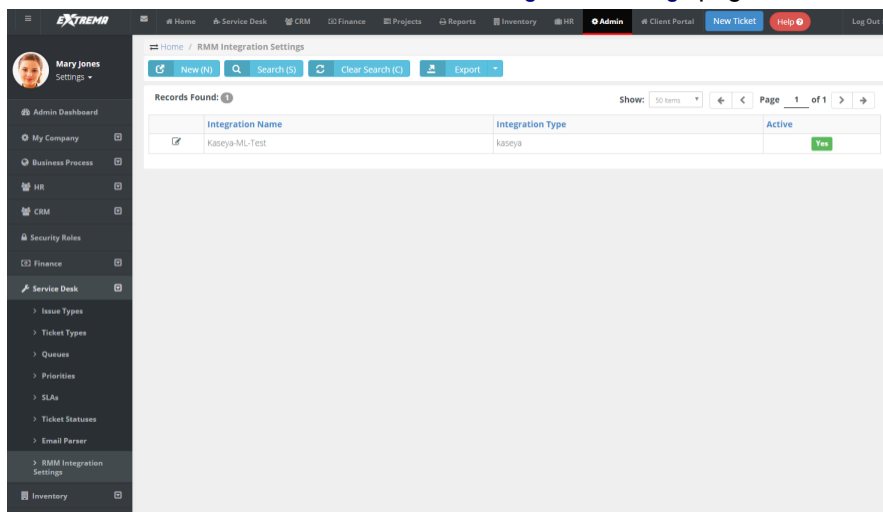
In this first procedure you integrate your **Vorex™** instance with a Kaseya VSA server.

VSA Prerequisites

- Identify the VSA address.
- Create a dedicated VSA user account used by Vorex to access the VSA. Example: `Vorex_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.



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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 Vorex uses to access the VSA. This should be a dedicated service account, such as `Vorex_service`.
 - **Integrator Password** - Enter the password for the Vorex 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 Vorex, 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.

The screenshot displays the 'Edit RMM Integration Settings: Kaseya-ML-Test' page. The 'Configuration Options' section includes: 'Enable RMM Integration' (radio buttons for 'Enable' and 'Disable', with 'Enable' selected), 'Integration Name' (text input: Kaseya-ML-Test), 'Integration Type' (dropdown: Kaseya), 'Integrator Username' (text input: <yourVSAusername>), 'Integrator Password' (password input: masked with dots), 'Server Address (IP:PORT)' (text input: 50.240.63.145), and 'Callback URL' (text input: https://<yourPSA> //KaseyaCallback.aspx?Client=kaseya+demo). The 'Ticket Defaults' section includes: 'Priority' (dropdown: Medium), 'Queue' (dropdown: Service Outage Queue), 'Ticket Type' (dropdown: Incident), 'Ticket Note Type' (dropdown: Email Received), and 'Ticket Source' (dropdown: Monitoring System). The left sidebar shows the user 'Mary Jones' and navigation options like 'Admin Dashboard', 'My Company', 'Business Process', 'HR', 'CRM', 'Security Roles', 'Finance', 'Service Desk', and 'Inventory'.

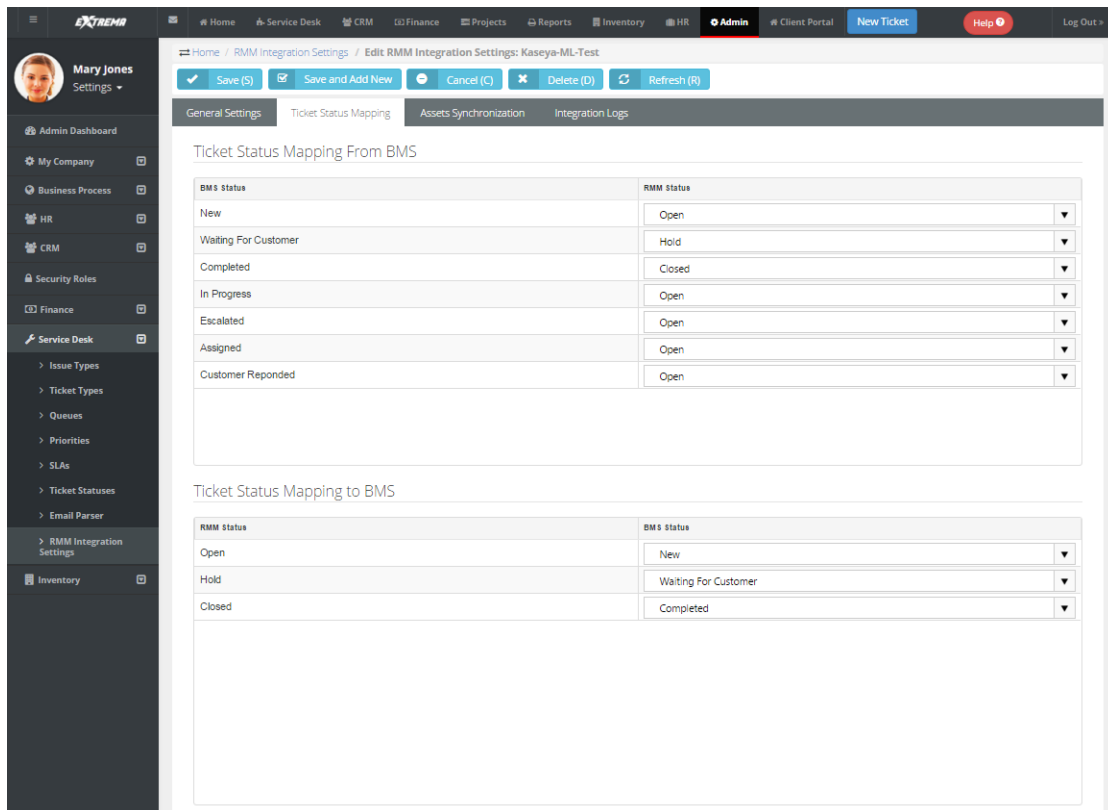
Integrating Ticket Settings

Admin > Service Desk > RMM Integration Settings

In this procedure you review default ticket settings and map ticket statuses between **Vorex™** 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 **Vorex™** 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 **Vorex™** 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 **Vorex™** and the VSA.
 - Ticket Status Mapping From Vorex
 - Ticket Status Mapping To Vorex
 6. Click **Save** to save the ticket defaults and ticket mapping.



Integrating Customer Accounts and Locations

Admin > Service Desk > RMM Integration Settings

In each **Vorex™** customer account you choose to integrate, you must map **Vorex™** customer accounts to VSA organizations. You must also map machine groups in each integrated VSA organization to locations in each **Vorex™** 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 **Vorex™** customer account.
5. Add or edit a location on the **Location** tab.
6. Click the **RMM Integration** tab in the dialog.

RMM Integration Settings - Kaseya v1

7. Select the VSA machine group that corresponds to this **Vorex™** 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.

The screenshot shows the EXTREMA CRM interface. The user is Mary Jones. The breadcrumb trail is Home / Accounts Management / Edit Account: ABC computer user. The page title is 'Kaseya Integration'. Below the title, there is a note: 'In order to link this Account with the Organization record of your RMM account, you have to specify the equivalent Organization's ID from your Kaseya Account.' There is a dropdown menu for 'Organization ID' with the text '--Select Matching Organization--'. Below this, there are tabs for 'Locations', 'Account Contacts', 'Assigned Resources', 'Tax Settings', 'Opportunities', 'Activities', and 'Linked Accounts'. The 'Locations' tab is active, showing a table with columns: ACTIONS, LOCATION, ADDRESS 1, ADDRESS 2, CITY, STATE, COUNTRY, and ZIP CODE. There is one row of data: Main, 1234 Main street, Any town, CO, UNITED STATES, 80920. There are also buttons for 'Add' and 'Delete'.

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 **Vorex™** using the **Load Assets** tab.
 - **Machine Group ID**
 - **Group Name**
 - **MAC Address**
 - **IP Address**

➤ First Check In

The screenshot displays the 'RMM Integration Settings' page for 'Kaseya-ML-Test'. The left sidebar shows the user 'Mary Jones' and various system navigation options. The main content area is titled 'Import Assets' and contains a 'Load Assets' button. Below the button is a table with the following columns: Machine Group ID, Group Name, MAC Address, IP Address, and First Check in. The table is currently empty, displaying the message 'No records to display.'

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

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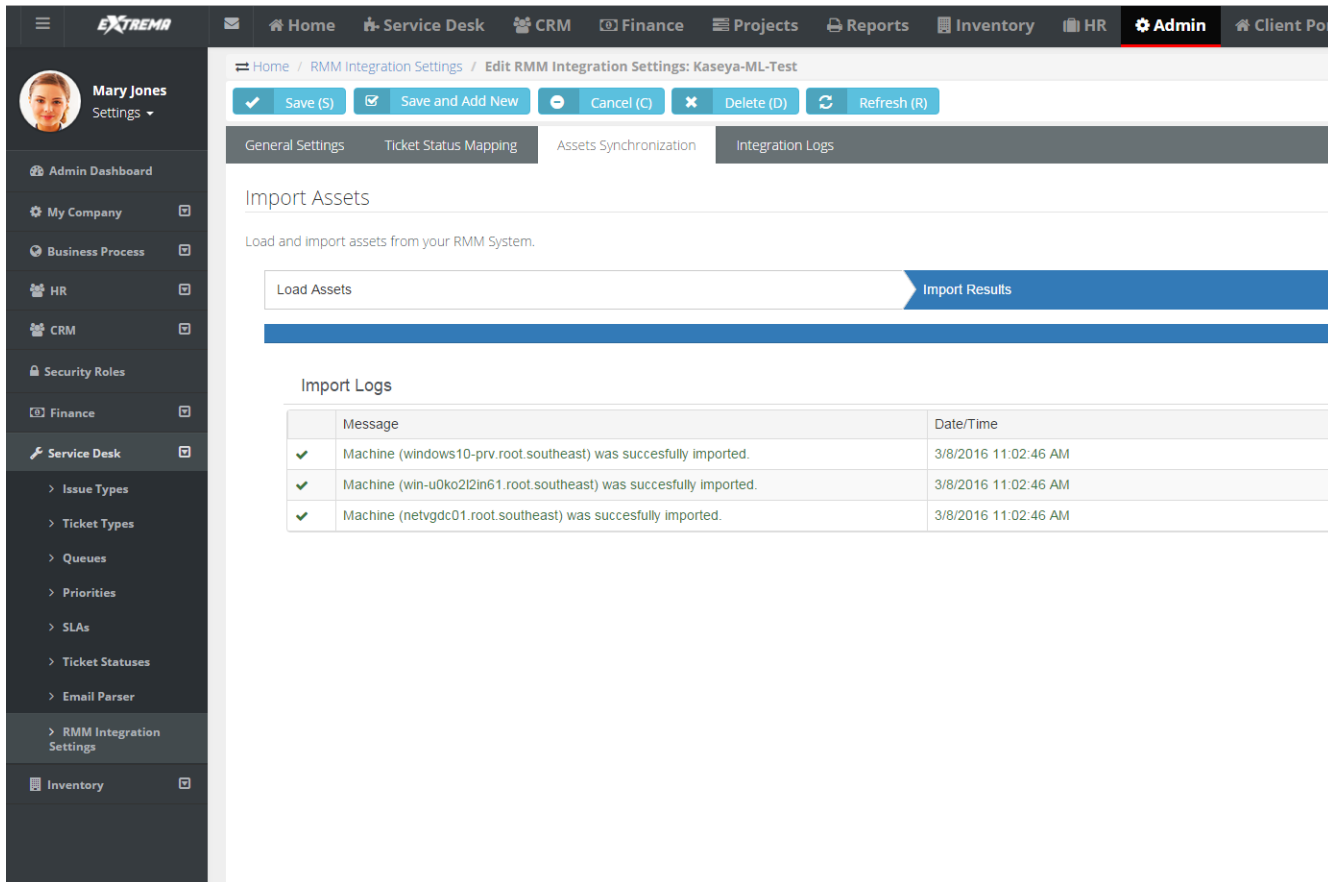
- Check the assets you want to import. You can also select the 'select all' checkbox in the upper left hand corner of the table to select all listed assets.

The screenshot displays the 'Import Assets' section of the RMM Integration Settings. A 'Load Assets' button is visible above a table of assets. The table contains the following data:

Asset Name	Location	ID	IP Address	Date
<input type="checkbox"/> ded-int05-vsa.root.southeast	root.southeast	00-50-56-01-00-75	192.168.2.115	9/19/20...
<input type="checkbox"/> mx01.root.southeast	root.southeast	00-0C-29-6A-63-DB	10.100.100.83	3/16/20...
<input checked="" type="checkbox"/> netvgdc01.root.southeast	root.southeast	00-0C-29-10-18-56	10.100.100.82	2/3/20...
<input checked="" type="checkbox"/> win-u0ko2l2in61.root.southeast	root.southeast	00-0C-29-A4-2F-B7	10.100.100.36	6/19/20...
<input checked="" type="checkbox"/> windows10-prv.root.southeast	root.southeast	00-0C-29-32-E1-C3	10.100.100.78	3/17/20...
<input type="checkbox"/> windows8-1.root.southeast	root.southeast	00-0C-29-A2-E5-76	10.100.100.79	3/17/20...
<input type="checkbox"/> winxp-ksa.root.southeast	root.southeast	00-0C-29-63-30-F5	10.100.100.250	4/14/20...
<input type="checkbox"/> desktop-cf2bi3j.root.unnamed	root.unnamed	58-82-A8-92-00-32	10.10.91.82	2/24/20...
<input type="checkbox"/> ksa-zyrion.sa.myorg	sa.myorg	00-0C-29-A0-27-9D	10.100.100.35	8/26/20...
<input type="checkbox"/> linux-f6pu.sa.myorg	sa.myorg	60-67-20-EB-40-7C	192.168.2.116	1/2/20...
<input type="checkbox"/> wintogo.sa.myorg	sa.myorg	20-68-9D-0B-E0-4D	192.168.2.139	8/2/20...
<input type="checkbox"/> ws-mlopez03.sa.myorg	sa.myorg	60-67-20-EB-40-7C	172.20.68.68	12/13/2...

- 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 Vorex > 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 **Vorex™**.

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 **Vorex™** select the Service Desk > Tickets page.
3. Select the **Vorex™** ticket created for the VSA monitoring event.

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

Home / My Tickets / Edit Ticket: 20G_20170331-1 - router connection issue

Ticket View | Time Logs | Expenses | RMM Integration | Custom Fields | Attachments 0

Ticket# 20G_20170331-1 - router connection issue
03/31/2017 12:51 PM - aspen/Main

Status: New
Priority: Medium
Total Time Spent: 0 hrs
Total Expenses: \$0.00
Due Date: None

Assignee:
Queue: Help Desk
CCs: None
Created By:

Ticket Properties

- Source: Email
- Ticket Type: Service Request
- Issue Type: None
- Sub-Issue Type: None
- Service Contract: None
- Work Type: None

SLA

- SLA: None
- SLA Status: No SLA.

Affected Assets

Hardware: (VMware-42 31 58 7d 90 35 49 95-7e d1 c5 c3 87 d4 1d 21) - ag-white-w732.root.aspen

Live Connect

intermittent failures on router 10.10.50.100

Activities | Expenses & Charges | Service Calls & To-Dos | Related Tickets | Survey History

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

- The **Ticket Reference** identifies the ticket in the VSA.

Home / Service Desk / CM / Finance / Projects / Reports / Inventory / HR / Admin / Client Portal / New Ticket

Home / Manage Tickets / #241-03062016# - windows10-prv.root.southeast is offline

Kaseya Integration

This section will show the equivalent Ticket Reference Number of Kaseya Ticketing platform during the integration with Kaseya.

Ticket Reference: 1570

Activities | Expenses & Charges | Service Calls & To-Dos

Add Note | Add Time | Quick Search

Email Received by System on 3/6/2016 3:40:45 PM
Note Date: 3/6/2016 3:40:45 PM
windows10-prv.root.southeast has not checked in since 10:47:06 pm 14-Oct-15