Integrate ConnectWise Manage with EventTracker
EventTracker 9.1 and above
Abstract

This guide assists the administrator(s) to integrate ConnectWise Manage with EventTracker.

Audience

Administrator(s) who wants to configure the ConnectWise Manage with EventTracker.
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ConnectWise Manage is a business process automation platform that allows your business to sell, service and support technology more efficiently and in a more streamlined way. The business management tool allows your business to centralize all information, automate business processes, real-time visibility in operations, and provide better customer support.

1. Prerequisites

1. **EventTracker Version 9.1 and above** should be installed along with respective ConnectWise related EventTracker update.

2. The system where **EventTracker Manager** is installed should be public-facing (Internet) and the application should be running with HTTPS protocol.

3. The **SSL certificate** which is used in EventTracker application should be a trusted one.

4. **ConnectWise Manage Version 2019.3 or higher** should be installed.

2. Integrating ConnectWise Manage with EventTracker

Many EventTracker users are using ConnectWise Manage to create cases and track the ticket status as well as the ticket history. Integrating ConnectWise Manage with EventTracker helps the users in viewing and tracking the cases created in the EventTracker “**Casebook**” and in the **ConnectWise Manage** platform. This avoids the hassles of switching between two different platforms.

3. Creating tickets for ConnectWise

The tickets in ConnectWise can be created from the EventTracker Incident module.

4. Mapping and Terminologies

<table>
<thead>
<tr>
<th>EventTracker</th>
<th>ConnectWise Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>Company</td>
</tr>
<tr>
<td>Systems</td>
<td>Configurations</td>
</tr>
<tr>
<td>Cases</td>
<td>Tickets</td>
</tr>
</tbody>
</table>

ConnectWise integration can be achieved through Auto-mapping as well as manual mapping of EventTracker Groups and Systems with ConnectWise Companies and Configurations respectively.
NOTE:
1. Multiple EventTracker **Groups** can be linked to a single **Company** in ConnectWise Manage.
2. Multiple EventTracker **Systems** can be linked to a single **Configuration** in ConnectWise Manage when mapped manually. However, during Auto-mapping, only one **System** is linked to one **Configuration**.

**Important NOTE:**

1. After applying the update ET91U19-032, login to the EventTracker application and go to admin-> PSA integration and check if any existing PSA instance is available. If found, then delete it and reconfigure the new instance of the PSA integration.

2. While adding new configuration in ConnectWise Managed company, the MAC address field is displayed only on selecting the Managed Server or Managed Workstation type.

![Figure 1](image-url)
5. Integration Steps for Auto-mapping

5.1 Prerequisites for Auto-mapping

1. The customer’s email is configured for the selected group under Group Management as shown in the following figure.

![Figure 2](image)

2. The above configured email is also configured in the respective ConnectWise Manage company’s primary contact details.

3. Reporting EventTracker agent’s MAC addresses are added in the respective configurations in the ConnectWise Manage company.

4. The reporting EventTracker agent’s MAC addresses are registered in the EventTracker console.

Note:

- Auto mapping of the group and company is done through the email domain matching. So only domain name needs to be same between group and the company.
- Auto mapping of the system and configuration is done through the MAC address matching. Auto mapping of systems works only for Windows systems as only Windows systems MAC addresses are registered through EventTracker agent. Any other sensors types such as syslog are not auto-mapped since they do not carry MAC addresses. They all need to be mapped manually.
5.2 ConnectWise configuration and integration

1. To enable the **ConnectWise Manage** in EventTracker, login to the **EventTracker web > Admin > Manager**.
2. Enable the checkbox “**Enable PSA Integration configuration**”.

![Figure 3](image1.png)

3. “**PSA Integration**” option is enabled in the **Admin** dropdown.

![Figure 4](image2.png)

4. EventTracker Administrator needs to contact the ConnectWise Manage portal member and get the credentials (API Keys) to connect to a specific instance.
5. Login to EventTracker web, navigate to **Admin** and select the **PSA Integration** option.
6. Enter all the required inputs in the ConnectWise manage page and click the **Test Connection** button. Once the connection is successful the green color indication is displayed.
7. Select the groups from the available group list that are to be mapped and then click on the **Save** button to Auto-map.

8. In “Mapping” section, all mapped entities are listed in Green color and is shown in the Mapped Companies/Configuration pane.
9. At any point in time, you can take out the mapping by selecting the **Remove map** option.

**Note:**
- Any failures during Auto-mapping are reported as Events/Alerts based on the configuration. If you have the access to the console logs, please view the log to know the progress of the Auto-mapping and any failures. All mapped groups/Companies and systems/configuration is visible in “Mapping” section. In case there are any corrections to be done for mapped entities, you can remove the map for those entities and map those entities through manual mapping.
- In case the Auto-mapping of Groups and Companies fails, please follow the manual mapping steps for mapping the Groups with Companies. Refer the below sections for manually mapping Groups and Companies. Once the manual mapping of Groups with Companies is done, click on the “**Save**” button in the mapping screen to Auto-map the systems and Configurations. All failures are reported as Events/Alerts based on the configuration. If you have the access to the console logs, please view the log to know the progress of the Auto-mapping and any failures.
- By default, the Auto-map is initiated on every 6 hours.
6. Integration Steps for Manual Mapping

6.1 ConnectWise configuration and integration

1. To enable the ConnectWise Manage in EventTracker, login to the EventTracker web > Admin > Manager.
2. Enable the checkbox “Enable PSA Integration configuration”.

![Figure 8](image8.png)

3. “PSA Integration” option is enabled in the Admin dropdown.

![Figure 9](image9.png)

4. EventTracker Administrator needs to contact the ConnectWise Manage portal member and get the credentials (API Keys) to connect to a specific instance.
5. Login to EventTracker web, navigate to Admin and select the PSA Integration option.
6. Enter all the required inputs in the ConnectWise manage page and click the Test Connection button.
7. Once the connection is successful the green color indication is displayed.

![Test connection](image)

6.2 Manual mapping of Groups and Systems

1. Select the groups from the available group list that are to be mapped and click on the **Next** button.
2. In PSA Tool dropdown, select ConnectWise Manage.
3. In the **Feature to Import** field, select **Companies**.
4. Filter the companies by Name/Identifier or Status.
5. Click Import.
6. Similarly, to import configurations, select Configurations option from the dropdown and then click Import and click Next.

7. In the Feature to Map field, select Companies.
8. Select Groups from the left pane and Companies from the right pane. In our example, we have mapped the group “48Tech and 5Ktech” to “Big Design, Inc.”
9. Click on Map.
10. The mapped group and company are listed in the Result pane as highlighted in the figure below.
11. Once the mappings are done, save it.

**NOTE:** In case there are already some groups that are mapped to companies, it gets listed in Green color and is shown in the Mapped company’s pane.
12. In the **Feature to Map** field, select **Configurations**.
13. Select the respective group from the dropdown list.
   
   **Note:** only the groups selected for the respective company is listed here.
14. Select the EventTracker systems from the left pane and the PSA configuration in the right pane.
   
   In our example, we are the “48Tech-DC1 and 48Tech-Exchsvr1” system to “BigDesign-Wrk1” configuration.
15. Click on Map.
16. The mapped system and configuration are listed in the Result pane as highlighted in the figure below.
17. Once the mappings are done, save it.

![Figure 17](image)

**NOTE:** In this case, there are already some systems that are mapped to configurations, it gets listed in Green color and is shown in the **Mapped configuration** pane.
18. At any point in time, you can take out the mapping by selecting the **Remove map** option.

### 7. Board Configuration

#### 7.1 Status

1. Navigate to the **Board** tab where you can map the Ticket status of ConnectWise Manage with the Case status of EventTracker and vice-versa.
2. Select the appropriate board from the dropdown options.
3. Select the **Ticket status** from the left and **Case status** from the right pane and then click **Map**.
   **Note:** It is mandatory to map all the ticket status with the case status.
4. The mapping can be viewed in the result pane.
5. Click **Save**.

### 7.2 Priority

1. Select the **Ticket priority** from the left and **Case priority** from the right pane and then click **Map**. 
   **Note:** It is mandatory to map all the ticket priority with the case priority.
2. The mapping can be viewed in the result pane and click **Save**.
8. Case and Ticket Management

8.1 Creating a ticket in the PSA Tool

1. To add a case from the incident page, click the gear icon and choose “Add a Casebook”.

2. At the bottom of the Case page, enable the option to Create a ticket in PSA tool.

Note: If the groups/systems are not mapped to any of the PSA companies/configurations, then the option Create a ticket in PSA tool is not available when adding the case book.
3. Once the option **Create ticket in PSA tool** is enabled and the casebook is saved, **Case** and the **PSA Ticket ID** is generated.
8.2 Viewing the tickets created in ConnectWise Manage

The cases created under Casebook in EventTracker can be tracked and viewed in the ConnectWise Manage.

1. Login to ConnectWise Manage. Navigate to Service Desk and then to Service Board in the left pane.

![Figure 24](image)

2. The created case in the EventTracker’s Casebook is viewed as a ticket in the ConnectWise Manage Service Board.

![Figure 25](image)

3. In our example, we are taking the Ticket id 909. Click on the Ticket to view more details.
4. The above Ticket 909 was created as a case under Casebook in EventTracker.

5. The case details are seen by logging into EventTracker web->Tools->Casebook.

6. The created cases are listed here.
8.3 Adding Comments for a Case

1. The **Comments** added for a **Case** can be viewed in **ConnectWise Manage** as notes in the **Notes** Pane and Vice-Versa.

![Figure 29](image-url)
2. The user can add notes or comments by clicking the Notes icon.
3. Alternatively, the ConnectWise User(s) can add notes from the **Time** tab or by clicking the icon.

![Figure 32](image)

### 8.4 Attachments in a Casebook

The attachment files added as references in the casebook can be viewed in the ConnectWise Manage.

![Figure 33](image)

In ConnectWise Manage, click the **Attachment** Tab to view the attachment for the respective Ticket.

![Figure 34](image)
9. Use of Callbacks (Webhooks)

“Callback” in ConnectWise Manage is a mechanism, implemented to get the details updated for a ticket in EventTracker. When a record is saved or updated for a ticket within ConnectWise Manage, it gets updated for the respective case in EventTracker.

<table>
<thead>
<tr>
<th>Type</th>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket</td>
<td>Ticket</td>
<td>Receive callbacks for specific tickets.</td>
</tr>
</tbody>
</table>

**NOTE:** The Level column might change depending on the requirement.

10. EventTracker Knowledge Pack

Once logs are received by EventTracker manager, Knowledge Packs can be configured into EventTracker. The following Knowledge Packs are available in EventTracker to support ConnectWise Manage.

After applying the update, the below mentioned KP items will be present in the following path

ET install path/EventTracker/Knowledge Packs folder.

10.1 Alerts

- ConnectWise Manage - New ticket created.
- ConnectWise Manage - Ticket reopened.
- ConnectWise Manage - Ticket modified.
- ConnectWise Manage - Ticket closed.
- ConnectWise Manage - EventTracker system mapping failed.
- ConnectWise Manage - EventTracker group mapping failed.

**Note:** By default, Alerts will be inactive once imported. Based on the requirement, you can activate the Alert and Email notification from Alert Management.

10.2 Reports

- ConnectWise Manage - New ticket created.
- ConnectWise Manage - Ticket reopened.
- ConnectWise Manage - Ticket modified.
- ConnectWise Manage - Ticket closed.
- ConnectWise Manage - All activity.
10.3 Categories and Saved searches

- ConnectWise Manage - New Ticket created.
- ConnectWise Manage - Ticket reopened.
- ConnectWise Manage - Ticket modified.
- ConnectWise Manage - Ticket closed.

10.4 Knowledge Objects

- ConnectWise Manage New Ticket Created.
- ConnectWise Manage Ticket Reopened.
- ConnectWise Manage Ticket Modified.
- ConnectWise Manage Ticket Closed.
- ConnectWise Manage EventTracker system mapping failed.
- ConnectWise Manage EventTracker group mapping failed.

10.5 Dashboards

- ConnectWise Manage - New ticket created by user name.
- ConnectWise Manage - New ticket created by domain.
- ConnectWise Manage - All activities.
- ConnectWise Manage - Tickets reopened.
- ConnectWise Manage - Tickets closed.
- ConnectWise Manage - Tickets modified.