ADVANCED AEM INTEGRATION
# Table of Contents

ONE UNIFIED PLATFORM ............................................................................................................. 3

1. Problem Statement .................................................................................................................. 3
2. Lessons learned from other RMM Integrations ..................................................................... 3
3. Advanced AEM Integration - Benefits .................................................................................... 4

INSTANT UNDERSTANDING OF WHAT IS GOING ON ................................................................. 5

4. The Alert Ticket ....................................................................................................................... 5
5. The Autotask Alert Dashboard ................................................................................................. 6
6. Configuration Items .................................................................................................................. 7
7. The Autotask Asset Dashboard ................................................................................................. 8

CONFIGURABLE BASED ON HOW YOU WORK ........................................................................... 11

9. Dashboard Configurability ..................................................................................................... 11
10. Configure AEM Autotask Integration ..................................................................................... 12
11. Configure AEM Ticket Defaults ............................................................................................ 13
12. Configure ticket attributes for AEM Monitors ...................................................................... 14
13. Configure Ticket Notes .......................................................................................................... 15

ELEVATE INSIGHTS AND LEAD THE USER ................................................................................ 16

14. Ticket Notes .......................................................................................................................... 16
15. Workflow Rules ..................................................................................................................... 18
16. Repeating Alerts .................................................................................................................... 19
17. Related Alerts ......................................................................................................................... 20
18. Self-healed Alerts ................................................................................................................... 21

ABILITY TO TAKE QUICK ACTIONS (DIRECT AEM CONNECTION) ........................................... 22

19. Access AEM from a Ticket ..................................................................................................... 22
20. Access AEM from a Configuration Item ............................................................................... 23
21. Access AEM site from an Account ......................................................................................... 24
22. Access AEM from Ticket Grids .............................................................................................. 25
23. Access AEM from Configuration Item Grids ......................................................................... 28
24. Setup AEM Linking in Autotask ............................................................................................. 31
ONE UNIFIED PLATFORM

AEM doesn’t just integrate with Autotask. It is Autotask.

A fully unified platform, Autotask Endpoint Management makes it easy to manage and monitor every aspect of your customer environment.

Problem Statement

IT Service providers need RMM solutions (like AEM) to work seamlessly with their IT Business Management Solutions (like Autotask). Rather than compete with each other, PSA/RMM become stronger when they fully integrate with each other.

Lessons learned from other RMM Integrations

Autotask integrates with all the major RMM vendors. Over the years, we have challenged our RMM partners to fully integrate with Autotask. We have found that RMM vendors provide enough details to Autotask so that IT Service Providers are driven back to their RMM platform. In order to maintain the client experience within RMM, many RMM vendors minimize the capabilities available directly within the PSA.

Here are the lessons from other RMM tools choice to fail to fully integrate:

#1. *Data Is King*

Data is power.

Asset and alert details are very valuable within both the RMM and the PSA. Data needs to be shared seamlessly between RMM and PSA. This data drives dashboards, reports and workflow automation. This data drives business intelligence.

There needs to be a single source of truth – available to all.
#2. Techs move between PSA and RMM

Technicians work on alerts both within the RMM and PSA. Techs need to move seamlessly among RMA and PSA. By tearing down the wall between PSA and RMM, allowing technicians to move amongst applications, we will drive efficiency.

#3. Assets are an integral piece of the IT Business Management Solution

In order to provide the proper level of support and to understand all the work performance on an asset for a resource, the assets needs to be fully populated within the PSA and be related to the proper resource and contract. By integrating assets into the PSA, you can drive accountability.

**Advanced AEM Integration - Benefits**

The goal of this project is to transform our entire AEM/Autotask integration. Our new ticket will go beyond an elegant UI. We need our ticket user experience to:

- Provide an instant understanding of what’s going on
- Be configurable based on how you work
- Elevate insights and lead the user
- Have the ability to take quick action
- Be easy to get more info

Those goals align with the vision of SmartIT and a focus on Efficiency, Accountability and Intelligence.
The Alert Ticket

When you open an Alert Ticket, you need to get a quick understanding of what is going on. You need to know:

- It’s an alert for a specific monitor
- The device associated with the alert (as well as device description and manufacturer)
- The trigger that occurred and associate policy
- Who last accessed the device and when

With this release, Autotask will be introducing a new ticket type of “Alert”.

Alert tickets created by AEM will also contain the monitor type.

Monitor Types can include:

- Backup
- Component
- CPU
- Disk Usage
- Event Log
- File Folder Size
- Memory
- Network
- Network Offline
- Online Status
- Printer Status
- Process
- Security Center
- Security Management
- Service
- Snmp
- Software
- Temperature Sensor

The alert ticket title will include the specific trigger info and the device. The title will be constructed as: "AEM Monitor Alert: [Monitor Alert] - [Monitor Trigger] for [Device Name]”.

The ticket description will include the AEM ticket, trigger name, policy name, device info, manufacturer and last access info. The description will be constructed as: This alert was generated from AEM alert #[AEM Alert Number] for the trigger "[Monitor Trigger]" within the policy "[Policy]". The [Device Description] ([Device Manufacturer]) was last accessed by "[Name of Last Accessed User]" on [Last Access Date/Time].
The Autotask Alert Dashboard

When you have a lot of alerts and support tickets to respond to, the Autotask Operational Dashboards provide an effective way to get the right work done first and more efficiently. It is much easier to digest and understand large amounts of information when they are presented visually.

As part of this release, additional alert and monitor data is being synchronized from AEM to Autotask. This allows you to create “data rich” alert dashboards.

Below you see one of our “default dashboards” for alerts. Rather than a long list of alerts, the user can get an immediate view of what is important.
At a glance – you see the picture of the alert backlog:

- 5 alert tickets with a status of new
- 22 overdue alert tickets
- 4 alert tickets are critical
- 2 alerts are CPU related and 4 are memory related
- 1 server related issue

**Configuration Items**

Much of the power of RMM tools comes from the information that they gather on assets that are being monitored. In order to fully leverage that data for both support and business, it is important that key asset data is synchronized to Autotask.

When you open a Configuration Item, you need to get a quick understanding of what is going on. You need to know:

- Hostname, Domain and additional IPs
- Manufacturer and Model
- Operating System name, version and service pack
- Architecture, Processor and Memory

As part of this release, this additional asset data is being synchronized from AEM to Autotask. The configuration items will display this data in a section called “Details From Endpoint Management”.

![EDIT CONFIGURATION ITEM (ID: 1)](image)
The Autotask Asset Dashboard provides a quick view of what’s happening you’re your AEM business for all assets. With all of the new Autotask AEM Asset System Fields provided with this integration, users can create their own business-specific widgets to improve their workflow.
Contract Review for AEM Assets

In order to provide proper support for alerts, it’s important to know which assets are covered under contract. You also want to know who uses the asset so you can relate all alerts and helpdesk tickets together for the end client.

Configuration Item

A new “Reviewed for Contract” checkbox is available at each Configuration Item to enable users to flag if the CI has been applied to an Autotask Contract. This flag will also control how the devices will/will not show up on the Configuration Item Mapping screen and can be used to report via Dashboard Widgets.

Dashboard widgets for Config Items Needing Review

This “Reviewed for Contract” flag field is available in Dashboard Widgets. You can set up dashboard widgets on your billing tab to quickly review newly found assets to assign to a contract.
Endpoint Management – Configuration Item Mapping

You can map configuration items waiting for contract review via the “Configuration Item Mapping” screen. On this screen, you can associate a group of configuration items to a contract and/or contact.
CONFIGURABLE BASED ON HOW YOU WORK

Dashboard Configurability

The default Alert and Asset dashboards are a great place to start and will show you the power of seeing your data. But every business is different — and what is important to one business or resource — might not be to another.

We have built our dashboards to be totally configurable.

• Create your own dashboard tabs

You can easily create your own dashboards from scratch using the “+” button to the right of the dashboard tabs.

• Modify your own dashboard tabs

You can modify your dashboard tabs using the setup button to the right of the dashboard tabs. The setup button will present a pull-down list which includes a “Tab Settings” option.

• Copying a widget

Sometimes it’s easier to copy an existing widget and modify it rather than creating a widget from scratch. To make a copy of a widget, use the “…” button in the lower right of the source widget and select the “Copy” option.

• Deleting a widget

There will be some default widgets that might not fit your business processes. Simply select the delete option to remove that widget from the dashboard.

• Changing the widget settings

You can easily change the settings of a widget by selecting the “Settings” option. Based on the type of widget, you will be presented with a “Widget Settings” screen.

• Creating new widgets on a display

On a dashboard tab, you can add widgets by moving to the next open space for a widget and an “Add widget” box will appear. Simply click in the “Add Widget” box to add a widget. You can create a new widget, start with a copy of an existing widget or choose from our widget library.
Configure AEM Autotask Integration

Within the Setup section of AEM, you will find a new Autotask settings page that provides both an overview of the integration details as well set Setup links for:

- Company Sync
- Ticket Sync
- Device Sync
- Alert Rules Setup
- Mapping Rules
Configure AEM Ticket Defaults

For each monitor ticket and alert origin, you can define the attributes for the associated Autotask ticket which is created. This will provide users a way to comprehensively set up some defaults to promote a more efficient workflow. When more granularity is desired, the Monitor Type defaults can be overridden per individual monitor. Defaults include:

- Queue
- Issue
- Sub-issue
- Worktype

Monitor Types can include:

- Backup
- Component
- CPU
- Disk Usage
- Event Log
- File Folder Size
- Memory
- Network
- Network Offline
- Online Status
- Printer Status
- Process
- Security Center
- Security Management
- Service
- Snmp
- Software
- Temperature Sensor
Configure ticket attributes for AEM Monitors

In addition to configuring the standard ticket attributes at the monitor type, you can specify specific ticket attributes at the monitor itself. When you add a new monitor, you can specify the Autotask ticket details including:

- Queue
- Issue
- Sub-issue
- Worktype
Configure Ticket Notes

You can configure how ticket notes are created for manually created tickets in AEM.

**Default Ticket Note Type**

The default ticket Note Type will be used as the Note Type for Ticket Notes manually created by users, via AEM. They will not apply to notes automatically created by AEM, during the creation of the ticket or with the Related, Repeat, Self Heal, or Cleared Alert Handling. Those notes will always use the newly created system note type "RMM Note".

**Default Ticket Note Publish**

The default ticket Note Type will be used as the Publish To setting for manually created by users, via AEM. They will not apply to notes automatically created by AEM, during the creation of the ticket or with the Related, Repeat, Self Heal, or Cleared Alert Handling. Those notes will always be published to internal users only.

![Ticket Sync Configuration](image-url)
Ticket Notes
When AEM creates an “Alert” ticket in Autotask, it provides additional details in the notes section in order to provide additional insights to assist the technician in better troubleshooting.

The three unique ticket notes will be automatically writer to all alert tickets which are generated by AEM, including:

- Device Snapshot
- Open Alerts
- Alert History
**Device Snapshot**

This note will outline device metrics such as the CPU, disk space usage, missing patches, etc. This gives you a general idea of the overall condition of the device that generated the alert ticket.

**Open Alerts**

This note will display information related to any other alerts that may be open for that device, broken down by monitor type. This gives you a general idea of what else is/was going on with the device at the time the alert ticket was generated, allowing you to see if the alerted/ticketed issue is the cause or a symptom of other issues with that device. We are also showing open alerts for the device’s account and this will allow you to see if there is a network issue.

**Alert History**

This note will display the number of alerts that were generated in the last 24 hours, last 7 days and last 30 days for the device. This lets you see how problematic the device has been, which may cause you to think about replacing it vs. fixing the immediate issue.
Workflow Rules

Workflow rules drive automation and allow customized notifications to staff and clients.

The Monitor Type will also be exposed in Workflow Rules to provide further options to route and move tickets effectively.

The workflow rules for service tickets will also allow conditional logic for the following new AEM fields:

- Device Type (AEM)
- Hostname (AEM)
- Domain (AEM)
- Internal IP Address (AEM)
- External IP Address (AEM)
- Manufacturer (AEM)
- Model (AEM)
- Operating System (AEM)
- Operating System Name (AEM)
- Operating System Version (AEM)
- Architecture (AEM)
- Service Pack (AEM)
- Processor (AEM)
- Memory (GB) (AEM)
- MAC Address (AEM)
- Operator (AEM)
- Number (AEM)
- SNMP Contact (AEM)
- SNMP Name (AEM)
- SNMP Location (AEM)
- Storage (GB) (AEM)
- Motherboard (AEM)
- Display Adaptor (AEM)
- Description (AEM)
- AEM Device UID
- Created by AEM
- Open Alerts (AEM)
Repeating Alerts

New Alert Rules are available in AEM to help users configure settings to help reduce the proliferation of tickets for the same issue.

The “Repeating Alert Rule” allows a user to configure a time interval in which the same monitor type and device generates a ticket for an alert. If another alert is generated that falls within this time frame, a note would be added to an existing ticket instead of an entirely new ticket.
Related Alerts

The “Related Alert Rule” allows a user to configure a time interval in which same device generates a ticket for an alert. A new ticket is created, but notes will be placed on both tickets, allowing users to be aware that something else is going on with the ticket at the same time.

You can also have related alert notes created on related tickets even when a monitor does not create a ticket. There is a “Add Related Ticket Note” checkbox that will work independently of the “Create Support Ticket” option.
**Self-healed Alerts**

The “Self-Healed and Cleared Alert” rule allows users to automatically change the status of a ticket if the alert (on the AEM side). The user can select how to update the status of the Autotask ticket based on whether the Autotask ticket still has a status of “New” or if the ticket is non-complete.

<table>
<thead>
<tr>
<th>Alert Rules</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Related Alerts</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Self-Healed &amp; Cleared Alerts</strong></td>
<td></td>
</tr>
<tr>
<td>– If an AEM alert clears and its corresponding Autotask alert ticket's status is New (self-heal), add a note to the existing Autotask alert ticket and set its status to:</td>
<td>[no change]</td>
</tr>
<tr>
<td>– If an AEM alert clears and its corresponding Autotask alert ticket's status is NOT New or Complete, add a note to the existing Autotask alert ticket and set its status to:</td>
<td>[no change]</td>
</tr>
</tbody>
</table>

[Save Settings]
ABILITY TO TAKE QUICK ACTIONS (DIRECT AEM CONNECTION)

There will now be a direct AEM connection right from an Autotask Ticket, Configuration Item, Account or associated grids that will enable users to open alert and devices.

Single sign-on will eliminate the requirement to log into both systems. Once you have linked your access between systems, you will not be required to re-enter credentials each time.

Access AEM from a Ticket

You can take action on the alert ticket to open the AEM Alert (no need to login to AEM once the connection has been established):

You can take action on the ticket's device to take control (no need to login to AEM once the connection has been established):

You can:

- Take a Screenshot
- Open Browser Agent
- Remote Takeover (RDP)
- Remote Takeover (VNC)
- Remote Takeover (Splashtop).
Access AEM from a Configuration Item

You can take action on the configuration item created from AEM. (no need to login to AEM once the connection has been established):

You can:

- Take a Screenshot
- Open Browser Agent
- Remote Takeover (RDP)
- Remote Takeover (VNC)
- Remote Takeover (Splashtop).
Access AEM site from an Account

You may want to access the AEM site from an Autotask account. There is a link to “Open the Endpoint Management Site” on the Account Tools.
Access AEM from Ticket Grids

It is very efficient for the technician when they can take quick AEM actions directly from ticket grids.

Ticket Search

When you search for tickets, the right click menu will include an “Endpoint Management” option to “Open Alert”, “Open Device” or take direct action on the device.
**Ticket Drill-in Grids**

The dashboard ticket drill-in grids also include an “Endpoint Management” option to “Open Alert”, “Open Device” or take direct action on the device.
Ticket Grid Widgets

The dashboard ticket grid widget’s action menu includes an “Endpoint Management” option to “Open Alert”, “Open Device” or take direct action on the device.
Access AEM from Configuration Item Grids

It is very efficient for the technician when they can take quick AEM actions directly from ticket grids.

Configuration Item Search

When you search for Configuration Items, the right click menu will include an “Endpoint Management” option to “Open Device” or take direct action on the device.
Configuration Item Drill-in Grids

The dashboard configuration item drill-in grids also include an “Endpoint Management” option to “Open Device” or take direct action on the device.
Configuration Item Grid Widgets

The dashboard configuration item grid widget’s action menu includes an “Endpoint Management” option to “Open Device” or take direct action on the device.
Setup AEM Linking in Autotask

Resource Management

With Admin Resource Management, the administrator can indicate whether an individual resource should have Endpoint Management links shown with the Autotask system.

User Profile

The User Profile screen contains an “Endpoint Management” tab. On this tab, the user can see the status of the linkage between Autotask and AEM. They will have the option to unlink the two systems.