



## ConnectWise Manage Integration Review Video Transcript

Welcome to the ConnectWise Manage Integration Review. In this video, we're going to cover the ConnectWise manage integration.

So, we've got the full documentation out on our website for the ConnectWise manage integration for those of you that like to follow the docs, and those docs again, if you go browse to our website, connectsecure.com, go to Resources, click on support, and then click View documentation. It'll take you to the main documentation page. And we've got the integrations area here you can tap to you can also search the words here if you're looking for it.

So, I'll just tap integrations and then on the left menu, and likewise is the very first one and this will be a step by step to take you through the beginning to the end. And I'm going to go ahead and step us through these steps today. So, we can integrate this together.

So, back on our Connect secure site, I'm going to just use that login button to get to our instance so this is the unified partner portal here. This is where we can get signed into our CyberCNS instance. So, I'm gonna log in and do our instance here for education.

And once you're logged in, we're gonna go up and tap on the global view. You will land on the integrations area the settings menu and then we're going to tap on the integration tile for ConnectWise. And this is where we're going to start to enter in some of the information about our ConnectWise environment.

So, we'll give the integration a name here we'll just call this ConnectWise manage hosted. Enter the company name. So, the company name would be the same name that you see when you go to log into your ConnectWise. So, you pull up your ConnectWise login and check what company are you using, that's what we'll enter here. And then your domain would be the site that you're using to log into your ConnectWise. So, if you're using ConnectWise hosted, you'll use the na.myConnectWise.net or if you're in the EU, it'll be a US or the EU. Otherwise, you can use your on premise URL. I'm going to go ahead and enter in our hosted one so na.myConnectWise.net

And then we're going to need a public and a private key. So, this will come from your ConnectWise environment you'll have to set this up in order to build these values. And so, I'm gonna go ahead and open up our ConnectWise here.

So, a prerequisite that you guys are going to want to do before you configure your API member, is I recommend that you build out the security role that's going to be necessary. So, every API member should have a security role as a best practice, right? We don't want to just grant admin level access to an integration we want to go ahead and build out the appropriate permissions needed for the least privileged access as a best practice for security.

So, in the documentation I mentioned early on in the video, we've got the steps to build out this connect secure security role, where you have just the right amount of permission, so the integration function. So, once you've got the security role built, you can then navigate over to the members area, manage so under System and go to members. And then we're gonna go to API members.

And from here, you will go ahead and create your new API member. Now I've got mine created. So, I'm gonna go ahead and drill down in this one. But if you were creating a new member today, you give it a name, give it a timezone. And then there's that role ID. So, again, this is that security role that we're going to grant to the user. So, we'll make sure that we use API connect, secure, your site, your level, your name, your location, and department and the default territory, and also select your default service board.

If you haven't a board that you're going to be routing tickets to go ahead and set our default one to our alerts and Monitoring Board and we'll give that a Save once you're done. And then we'll go to the API keys tab. And from here, we're going to build out a new API public and private key so I'll just call this an excerpt here. I'll give this a save and it will display our keys here. I'm going to go ahead and copy that. And we're going to use that value back on the Republic. We'll go back and grab the private very important that you document your private key once you save and leave this screen. This will mask and you will not see it again. So, it's a good idea if you want to document this in your documentation system before you close out of the screen. And pathways will prompt you again one last time before you click OK here that hey, if you don't copy this, you will lose viewing of it. So, I'm going to click OK. We'll jump back and we'll paste that key. In and we'll get to that a save.

So, once we save there should get a message up here that it's been successfully initiated. We will see the company Mapping tab start to open up. This will let us know that we're connected. And from here, we will start to map all of the different integration settings for ConnectWise and connect secure companies.

So, we've got some choices here at the second level for events. So, the event sets are defining what events we want to be notified on. The integration profile is where we're going to define some of the options and attributes about our ConnectWise instance. So, for example, what service or what status is what priority. I'll take you through those.

And then last but not least is the Manage company mappings. So, this is the mapping between companies in CyberCNS over to your ConnectWise manage. So, from here, I'm gonna go ahead and map our first company. For those of you that are familiar with the testing company, I'm going to map our XYZ test company most ConnectWise databases will have an XYZ test company so I'm gonna go ahead and use that as my test today.

So, under Manage company, under mapping info, we're going add and you have a choice here to import from ConnectWise. Or if you've already created a manual company in CyberCNS, you can go ahead and map to it. So, since I didn't already create a company, I'm going to just say import from ConnectWise, we'll go next. So, this drop down has gathered a list of all the companies in the ConnectWise environment. You can go ahead and start to select the ones that you want to bring in. I'll go ahead and choose our XYZ Costco for this example today. So, I'm just going to do one company. You can do multiples again, if you wanted to map multiples, you could check multiple companies out there to bring in multiples at the same time. And also if you're not finding your companies in that list, you can use the searching criteria to the right here to actually search for your company's searching. If you've got a list of

companies that's too large, a drop down and once you select your company, it will go ahead and at the bottom and let you know the company name that it's creating.

And then we've got some options to signal attributes about this company to CyberCNS. So, no notification for example, we check that box off this will tell CyberCNS that this company should not get any notifications out of the system. So, no email notifications, no ticketing, notifications, anything like that. Enable configuration will allow us to sync over any assets in the company from CyberCNS over to your ConnectWise manage as a configuration.

So, we will create a configuration type in ConnectWise called Connect secure, where we will sync over any of the assets we've discovered. And in that configuration will give you some technical details around the endpoint, some of the local hardware and software information and then also some of the compliance scoring and benchmarking against that asset in the lens of vulnerabilities that we've discovered on and then lastly, you've got an enable notification and this would allow us to enable notifications and then also define event sets and integration profiles.

Now these would need to already have been configured. If you've got them pre set up at the global level then you can tag them here. Otherwise we can set these up after we get the company imported. So, for a company mapping purposes, I'm going to go ahead and leave these options off for now I will re enable these. We're just going to go ahead and hit next here to map this company. And then once you're done, it will kind of give you just a recap of hey, here's what we're mapping. Here's some of the attributes you defined and you can give it a finish when you're done. And that will actually finish the import of the company.

And once the company is in, it will populate in this view. So, you can now see that we've got the company name mapped to CyberCNS and ConnectWise and then again some of the attributes about that mapping specifically in regards to event sets, integration profiles, and are we doing notifications and are we doing configurations so that is pretty simple right mappings between the companies very simple and once you've once you've got the companies mapped and you come back up here to the company view, you'll see those companies will start to appear in your drop down. So, an executor education was a company that I created manually in Connect secure was not met through the PSA and then the XYZ Tesco is the one that had would have come through from my ConnectWise manage integration. So, that's the company mapping section. So, again, go back to the global, I'll tap back to ConnectWise and again, I'm up on that company mapping section. That's where you would map then the rest of your companies. And as I proceed and once mappings are done, we can also start to look at integration profiles and event sets. So, we'll go ahead and define our first event set. We'll call this one our sample event set and under the event set, we've got different categories and then if you click on these accordion style headers, we will drop down what types of events fall under the under the category so under agent we've got probe went down or Server Agent window under company we've got Hey, a new company was created under assets, you know, a new asset was created an increase in the vulnerability count and so on and so forth.

So, each of these has a different event set based on some of the functions of the vulnerability management system. I would say the probably the most heavily used one that I see is when you have an Active Directory integration and the under the ad audit section got a lot of really good events to help bring awareness to the server administrators to the Active Directory administrators. So, people understand what's going on in the environment right, accounts being added removed, security groups being added removed, companies being added removed, so on and so forth.

So, all these event sets are documented again back on our documentation page, we've got an extensive list of all the event sets and what they're all there for. So, under your company mappings, you can go ahead and start to define Hey, what do you want to know about the events and you know, once you've checked these boxes off and you get them all set the way you want you can give that a save, and that event set will be saved under that company's mappings. And if you don't see it there right away, sometimes it takes a second to pop up or you might just hit that refresh, and it will come in. You'll notice that once we set up an event set you can do more than one so you don't you're not limited to a single events. And you'll notice there's an is the fault and any event set can be flagged as a default event set. That way if you map a future company, you can define a default set of events that you want to happen for every company every time and that's what you would use your default checkbox for.

Okay, so once you've got an event set defined, you can then go to your integration profile area. We'll hit Add, and this is where we're going to define some of the attributes about the ConnectWise integration specifically to our to our service for so we'll call this our make lace manage integration profile.

Choose a credential so this is again our ConnectWise manage hosted that was back on the integrations page. If you had multiple ConnectWise instances, you can separate them out by name here. And then this is where we're going to choose what service board we want to map to. So, in our ConnectWise instance, we've got these five sorry, six service boards available or five service boards available to us. We'll go ahead and choose the one we want to route our events to the leaves, alerts and monitoring.

We've got a source name so where did this ticket come from? These are pulling directly IU ConnectWise setup table values or the source so if you want to add in one for connect secure or CyberCNS, you could add that in, although I'd choose internal for now. And then again, you've got your service type subtype and items. So, if you've got specific types of type and items on your boards, and you want to target some of these tickets to do better reporting better sorting better filtering, this is a really great area to plan around what reporting will look like what are going to be some KPIs even that we'll use to look at this data. So, this is a great section. If you're using connect lines and you're doing reporting out of it. This will be a really good area to plan how you want to sort report and filter on some of your connects to secure events that are coming in. And then your status is right. What status Do you want to map open tickets to so generally just to a new and then select Status for mapping to closed tickets. So, again, for closed we've got a couple options. I'll use this closed automation that we've created.

And again, that will let me know when tickets are being closed automatically versus tickets being resolved or closed by a human or an engineer. We've got a priority when again, these are just pulling through our priorities from ConnectWise so whatever priorities you have in your setup tables will feed here I'll just use that as my default a p three.

And then we've got a note type to signal. Where do you want the notes from the Connect secure comments that get put into tickets to show up in your connect lines? You can choose external or internal external would be referred to as the discussion area of the ConnectWise ticket, where it is generally customer or partner facing and then internal for you just want those notes to hit the internal analysis which generally would not be seen by your points. So, I generally like to go to the internal on anything that's an alert or monitor. So, all I didn't choose that. And once you've got those in place, give that a save. And that will be your integration profile, and how the ConnectWise integration will integrate to what board to what status and how it's going to behave when we're dealing with some of the event notifications that are going to come out of there. So, pretty simple three step setup here. Once you get

the company API keys issued, you're simply going to map your company's define an event set define your integration profile. And that is really it. That connection between ever seen us and connect secure. So, moving forward, you can expect to start to see any assets that have been coming to connect secure show up and your ConnectWise managers configs. And you can start to immediately receive alert notifications based on your event set and integration profile sites.