EXIUM

Excel Maximum®

Exium-Autotask PSA integration

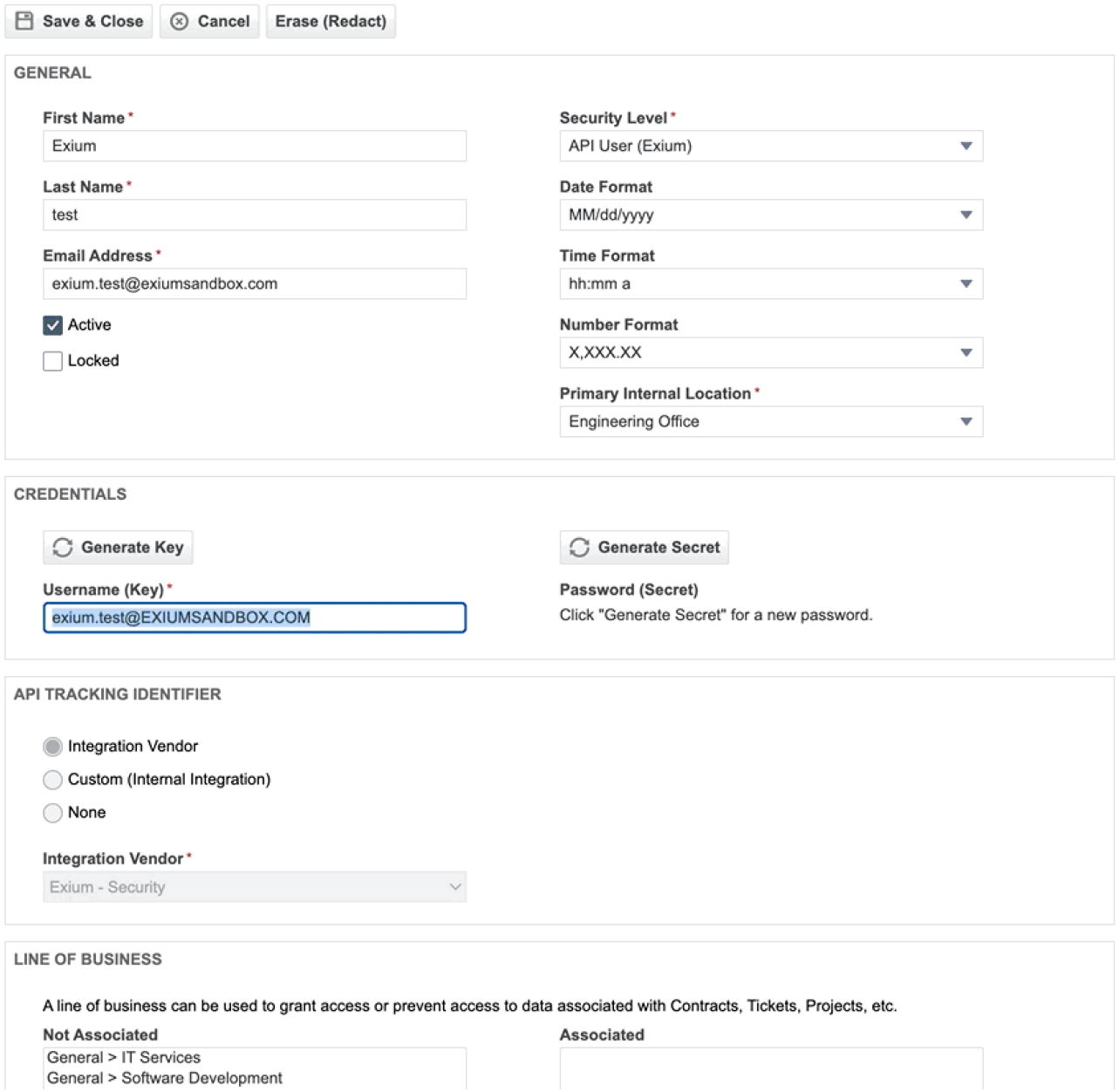
Overview

Exium's Intelligent Cybersecurity Mesh™ provides secure access to distributed workforce and IoT devices, protecting businesses from malware, ransomware, phishing, denial of service, and botnet infections in one easy to use cloud service.

From raising security incidents to tracking the tickets to closure, Autotask's Exium integration handles workspace administrators to seamlessly track different security incidents identified by Exium. Administrators can easily create Autotask integration handle on Exium profile configuration.

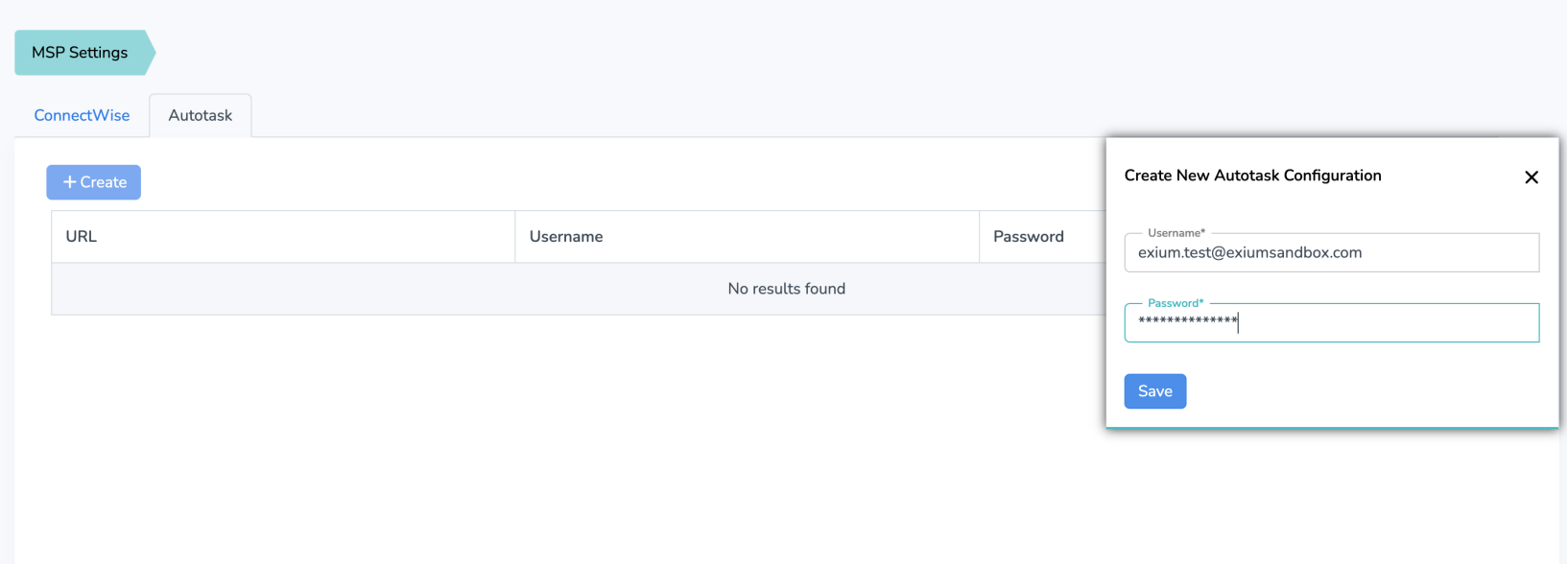
The remainder of this guide is focused on steps to enable partners to configure both Exium and Autotask to get integration up and running.

Step 1: Create API User



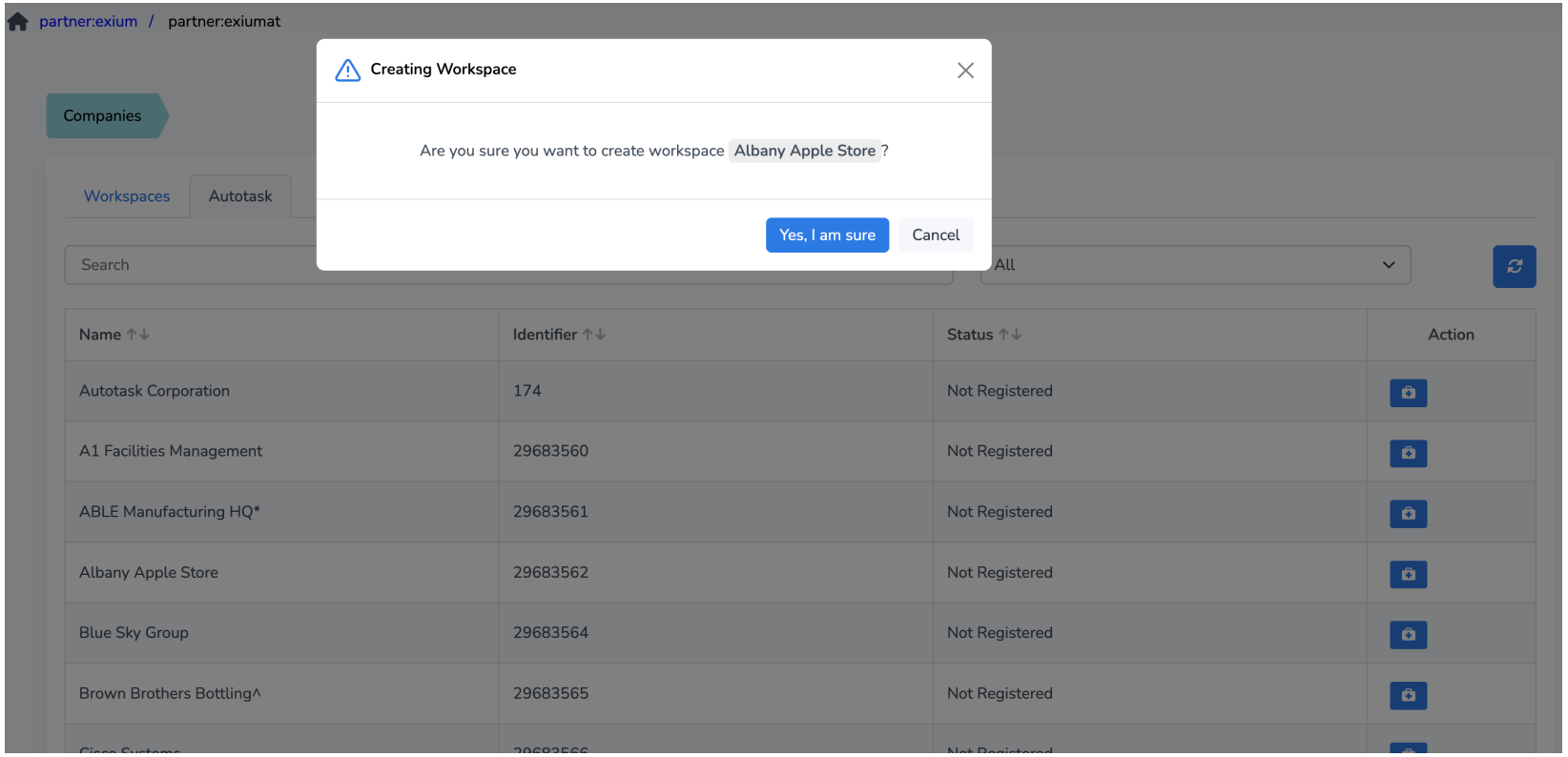
- In Autotask portal, click on Admin -> Resources (Users) from top left corner.
- It will open Resources page. Click on New -> “New API User”
- Enter “First Name”, “Last Name”, “Email Address”, “Security Level” under General. Enter “Username (Key)” and “Password (secret)” under Credentials.
- Select “Integration Vendor” under API Tracking Identifier and select “Exium – Security” from drop down as “Integration Vendor”.
- Click on “Save & Close”

Step 2: Configure API User on Exium



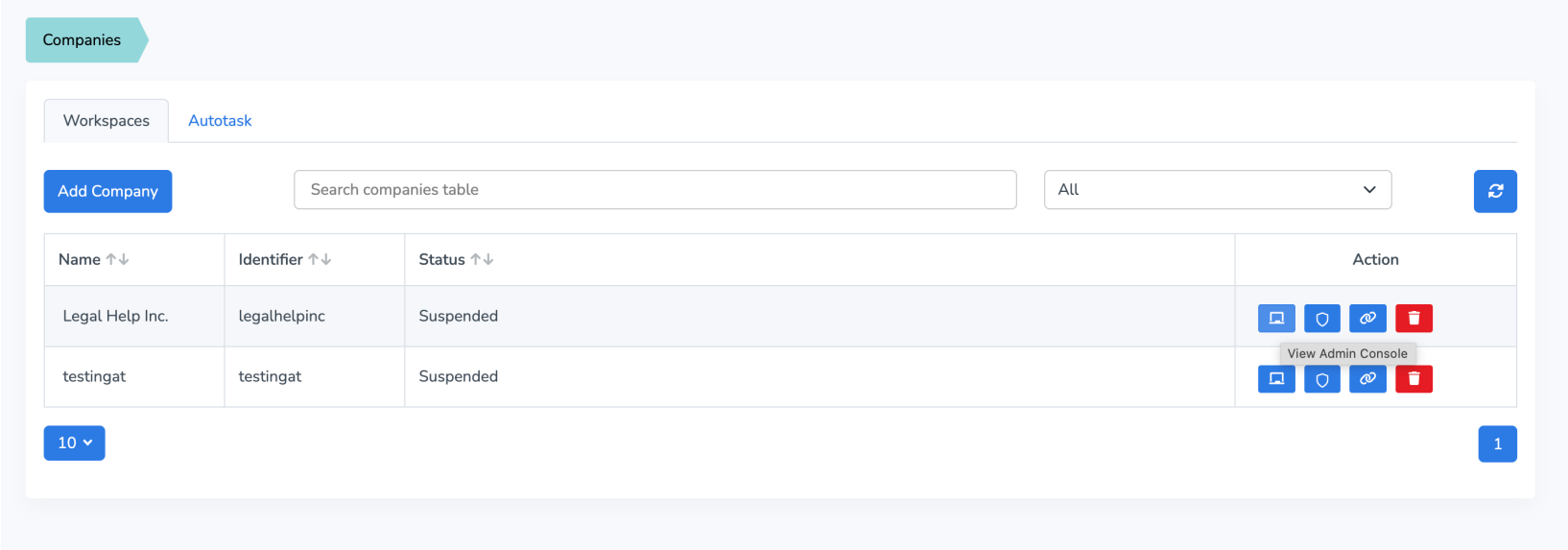
- In Exium partner portal, click on “MSP Settings” on Admin Console.
- Click on “Autotask” tab under “Companies” page and click on “Create” button
- Enter “Username”, “Password”. These shall match with credentials created on Autotask portal in step1.
- Click on “Save”

Step 3: Companies List, Create End Customer Workspace



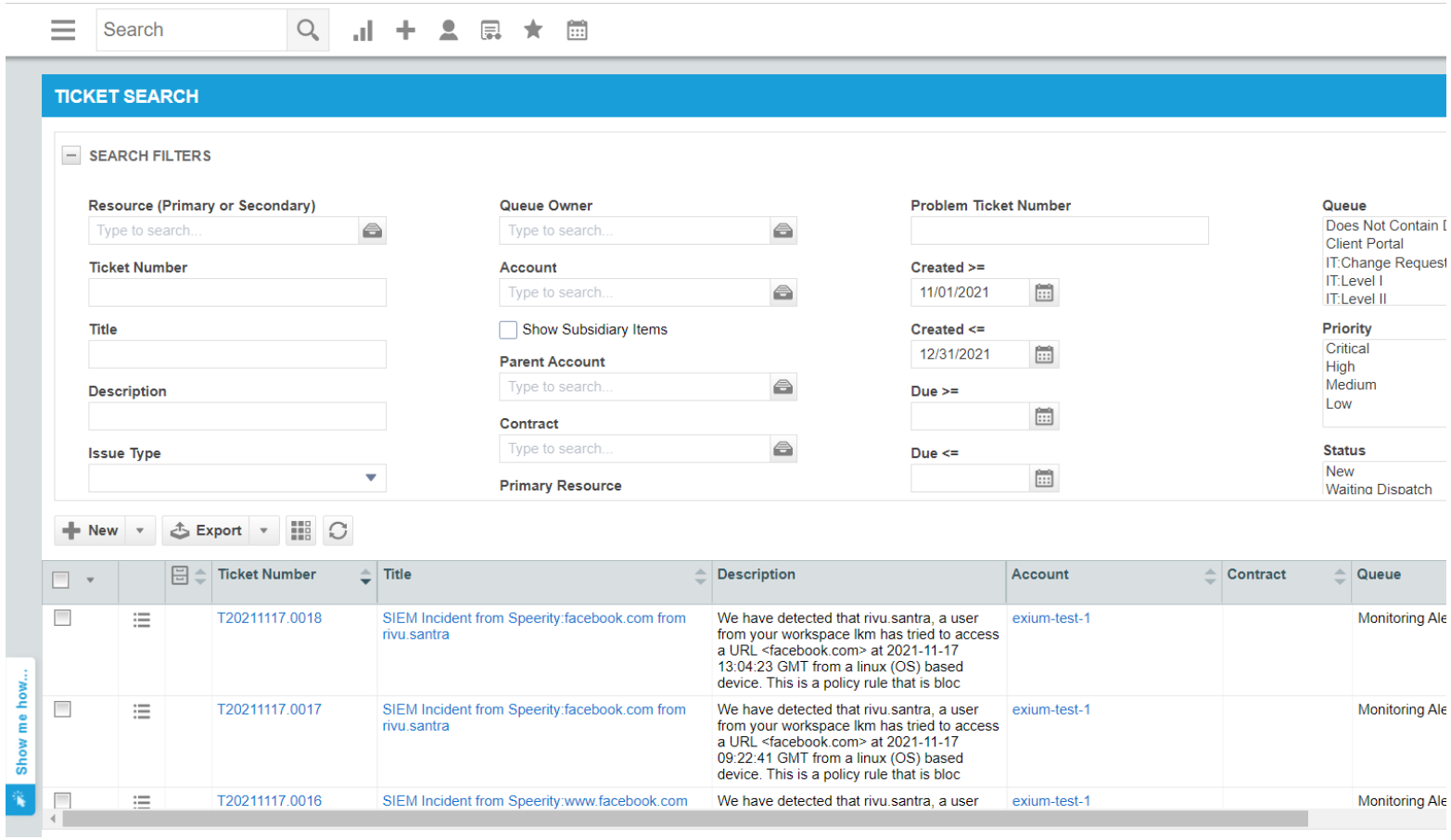
- In Exium partner portal, click on “Companies” on Admin Console.
- Click on “Autotask” tab under “Companies” page.
- Exium pulls all the accounts from Autotask and shows as list of companies.
- Select any company and click on “Create WS” icon on Action column
- Click on “Yes. I am sure” on confirmation dialogue
- End customer workspace gets created on Exium

Step 4: Manage Company Workspace



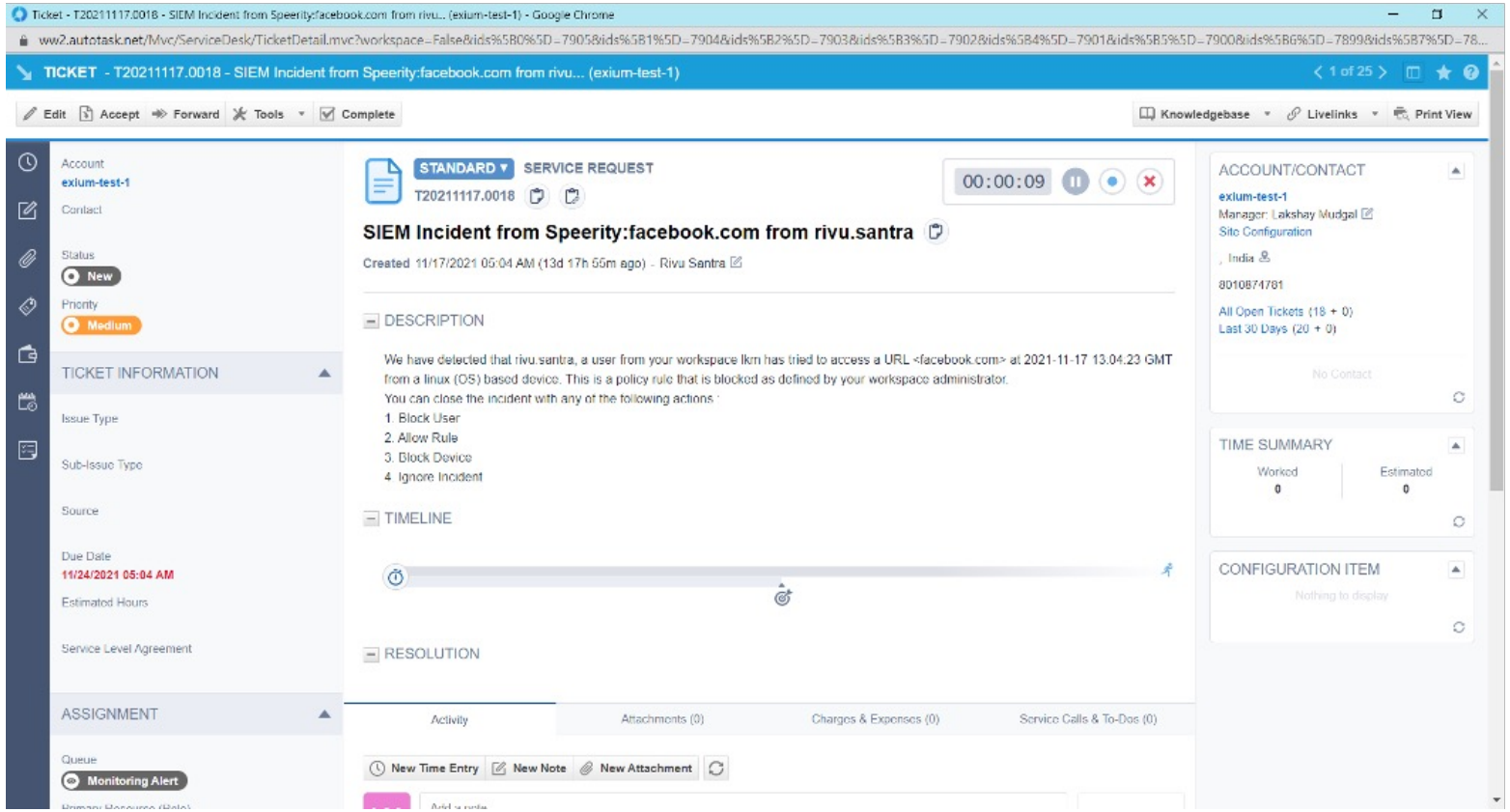
- Click on “Workspaces” tab under “Companies” page. Page shows list of workspaces created till now
- Click on “View Admin Console” icon (1st icon) on Action column
- New tab will open on browser with company workspace
- Workspace management activities like adding users, adding policies and viewing Dashboards are available.

Ticket Management In Autotask



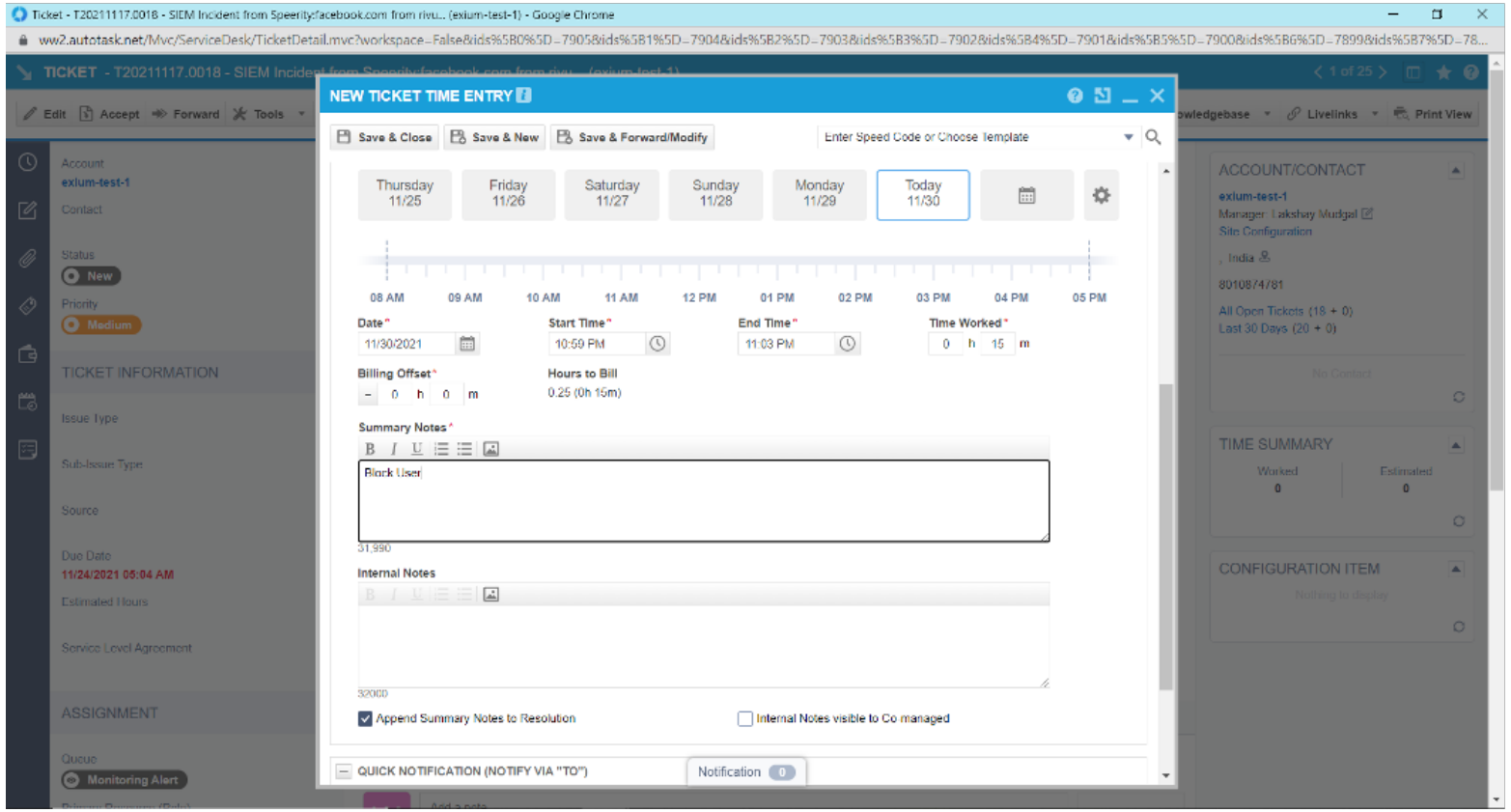
- When users of a company starts using Exium service, Exium will raise tickets automatically in Autotask for any type of security incidents.
- Tickets can be viewed under Tickets page. Account column indicates end company name.
- Tickets can be searched in Service Desk->Ticket Search.

Ticket Management In Autotask



- In Autotask ticket can be viewed and will be shown like this.
- To solve the ticket one of the options shall be used while closing the ticket as resolution comments.
- To close a ticket, click on “Complete”.

Ticket Management In Autotask



- After ticket is resolved, partner can take different actions which will be read by Exium to take necessary actions.
- All the possible actions are shown in ticket description. The action text from description must be pasted as is in summary notes and select “Append Summary Notes to Resolution”
- Click on “Save & Close”. Exium will apply the necessary action.