# islonline

# Integration of ISL Online and Autotask



Remote Desktop

Send an email to sales@islonline.com with the subject "Please enable Autotask integration". The content should include your ISL Online account username and number of Autotask users.

It may take few days until ISL Online enables the integration on your account. You can follow the next steps of this manual already before, but, will not be able to test the integration until your account is enabled. Enabling the Autotask integration may be subject to a fee.

### **STEP 2**

Please confirm you have specified a domain for your ISL Online account: Log in to your ISL Online account at www.islonline.com. Click "Users". You should see the users of your account listed under your chosen domain name. If no domain has been specified for your account yet, please follow these instructions to create one: https://help.islonline.com/19802/166258

# STEP 3

Please contact your Autotask account manager to create an API user in your Autotask environment with name "ISL Online", username e.g.islonline@ yourcompany.com. This user will be used for appending remote desktop session information into tickets. Please mind that the user name is presented exactly as "ISL Online".

Autotask Licensing: The "ISL Online" user needs to be added in Autotask as an API licensed user. All Autotask accounts include some API users free of charge. Talk to your Autotask account manager for further information.

Make sure the API account is unlocked and credentials are correct by logging into Autotask using the newly created API account. If your API account is locked, contact your Autotask account manager to unlock the API account.

Open Autotask and log in with your username and password.



Go to Admin > Admin categories > Extensions & Integrations.



Expand Autotask add-ons and click "LiveLinks Designer" link.

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Expand All Collapse All					Ĺ O
- AUTOTASK ADD-ONS					
AutoForms Designer A wizard that generates the components of a form used to collect Enable mobile access to Autotask for your resources.					
and move new leads from a Web page directly into Autotask.					
Create intelligent links from Autotask to external applications or web sites, or customized links within Autotask.					
ENDPOINT MANAGEMENT					
+ CLIENT PORTAL & TA SKFIRE					
+ MICROSOFT EXTENSIONS					
+ OTHER EXTENSIONS & TOOLS					

Click the "**New**" button.

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LiveLinks Applications Security Policies										
+ New Explore the AXN LiveLinks Catalog										
LiveLink Name *	Description	Entity	Туре	Created By	Active	Create Date	Published			
_dev_Open ISL Light dashboard	Opens the ISL Light dashboard where you can start a new support session and see the session history for the current ticket.	Ticket	Standard	Pierce, Pamela**	~	06/13/2016	~	11		
_dev_Start an ISL Light session	Opens the SL Light dashboard where you can start a new support session and see the session history for the current ticket.	Ticket	Standard	Pierce, Pamela**	~	04/08/2018	~	11		
Autotask Client Portal	LiveLink will log the customer into their Autotask Client Portal account	[No LiveLink Entity]	Standard	Administrator, Autotask	~	03/03/2010	~	11		
LogMeIn Rescue Support Session Launch	This LiveLink opens up a new browser window and launches the LogMeIn Rescue Console. If you are [No Standard ~Installed 04/18/2016 the Rescue Console. Support is now just a click away. Before the LiveLink is available for use it must be published. The LiveLink can be accessed through the LiveLinks folder on the left side of the screen under any Module that it has heap nublished for									
Managed Workplace - Central Dashboard	This LiveLink automatically logs the user into the Managed Workplace Central Dashboard, the starting point from which network resources can be managed easily. Before the LiveLink is available for use it must be published. The LiveLink can be accessed through the LiveLinks folder on the left side of the screen under any Module that it has been published for. NOTE: This Link requires some editing in order to work. See the Install Instructions for more details.	[No LiveLink Entity]	Standard	~Installed		10/17/2007	*			
Managed Workplace - Device Alerts	This LiveLink opens the Device alerts page for the current Installed Product in Managed Workplace. Quickly view any alerts for the device using Level Platforms Managed Workplace, now available right from Autotask. Before the LiveLink is available for use it must be published. NOTE: This Link requires some editing in order to work. See the Install Instructions for more details.	Installed Product	Standard	~Installed		10/17/2007	~			
Managed Workplace - Device Information	This LiveLink opens the Device information page for the current Installed Product in Managed Workplace. Quickly see the status of your network devices using Level Platforms Managed Workplace, now available right from Autotask. The username and password are stored in the LiveLink Application, so users will be automatically logged into Managed Workplace. Before the LiveLink is available for use it must be published. NOTE: This Link requires some editing in order to work. See the Install Instructions for more details.	Installed Product	Standard	~Installed		10/17/2007	~	~		

Fill the form with following settings:
LiveLink Name: ISL Light session start
Label: Start an ISL Light session
Category: Service Desk
Description: Starts a new ISL Light support session.
LiveLink Application Name: [No LiveLink Application]
Entity: Ticket
Base URL: https://autotask.islonline.com/integrations/autotask/sessions/start

Parameter name	Parameter value	Comment
autotask_login_password		Autotask login of API user "ISL On- line" created in Step 1
autotask_login_username		username of API user named "ISL Online", e.g. islonline@yourcompa- ny.com, created in Step 1
autotask_login_wsdl	https://webservices2.autotask.net/ atservices/1.5/atws.wsdl	it should contain the number of your Autotask server. E.g. if you login on https://ww5.autotask.net, the WSDL URL should be https:// webservices5.autotask.net/atser- vices/1.5/atws.wsdl
autotask_ticket_id	<ticketid></ticketid>	Parameter name
autotask_user	<autotask_username></autotask_username>	Parameter name
islonline_login_password		your ISL Online account login password
islonline_login_server	islonline.net	islonline.net for SaaS or your server hostname for Server License
islonline_login_username		your ISL Online account login user- name e.g.\\company\username

### **STEP 9** Click "**Save & Publish**" button.

ww2.autotask.net/autotask/AutotaskExtend/livelinks/livelinkEditor.aspx?livelink_id=0							
LIVELINK™		0					
Save & Close         Save & Publish         Cancel         Test Live           LiveLink         Configuration         AXN Upload Instructions	eLink						
LiveLink Name* ISL Light session start Label* Start an ISL Light session Description Starts new ISL Light support session.	✓ Active Category* Service Desk LiveLink Applica [No LiveLink Appl	Execute In Debug Mode					
Entity* Ticket Account Manager Address First Line Address Second Line Adterss Second Line Asset Value City Company ID Company Lead Source (UDF) Company Number Company Number Company Number of Employees (UDF) Comfiguration Item Battery Life (UDF) Configuration Item Brand (UDF) Configuration Item IP Address (UDF) Configuration Item IP Address (UDF) Configuration Item IP Address (UDF) Configuration Item Name (UDF) Configuration Item Name (UDF) Configuration Item Name (UDF) LiveLink Parameters Configuration Item OS (UDF)	▲ Insert	Base URL*   https://autotask.islonline.com/integrations/autotask/sessions/     Querystring Values     Form Post Parameters     New   Parameter Name Parameter Value      uline_login_usernam     ask_login_password					

Check "Service Desk User" under Security Levels tab.

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LIVEL	INK PUBLICATI	DN				•			
💾 Sa	ve & Close 🛞 C	ancel							
LIVELI	NK INFORMATION								
Liv	eLink Name:	ISL Light session s	start						
Liv	eLink Description:	Starts new ISL Lig	ht support session.						
Liv	eLink Entity:	Ticket							
Overv	iew Modules	Security Levels	Departments	Resources					
Select	Security Level								
	Contractor								
	Dashboard User								
	Full Access								
	Manager								
	Minimal Access								
	Private CRM								
	Project Manager								
	Sales								
	Service Desk User								
	System Administrat	or							
	Team Member								
	Time and Attendan	ce							

Select user(s) under **Resources** tab and click "**Save & Close**" button.

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LIVEL	LIVELINK PUBLICATION									
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LIVEL	INK INFORMATION									
Li	veLink Name:	ISL Light session s	lart							
Li	veLink Description:	Starts new ISL Ligh	t support session.							
Li	veLink Entity:	Ticket								
Over	view Modules	Security Levels	Departments	Resources						
Selec	Resource									
	Administrator, Autot	ask								
	Anderson, Scott									
	Brown, Michael									
	Davis, Gary									
	Jackson, Timothy									
	Johnson, Allison									
	Jones, Cindy									
	Miller, Susan*									
	Moore, James*									
	Pierce, Pamela*^	N								
	Smith, Matthew	13								
	Taylor, Mark*									
	Thomas, Kathy									
	White, John									
	Williams, Steve									
	Wilson, Frank*									

Right click on the ISL Online session start LiveLink and click "Copy LiveLink".

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	LIVELINKS DESIGNER™									
- New	LiveLinks       Applications       Security Policies									
LiveLink Name	Description			Entity	Type	Created By	Active	Create Date	Publishe	.d ^
ISL Light session start	Starts new ISL Light support session.		1	Ticket	Standard	Pierce, Pamela**	~	08/04/2018	~	18
_dev_Open ISL Light dashboard	Opens the ISL Light dashboard where yo the current ticket.	Edit LiveLink Inactivate LiveLink	he session history for	Ticket	Standard	Pierce, Pamela**	~	06/13/2016	~	
_dev_Start an ISL Light session	Opens the SL Light dashboard where yo the current ticket.	Copy LiveLink	e session history for	Ticket	Standard	Pierce, Pamela**	~	04/08/2016	~	
Autotask Client Portal	LiveLink will log the customer into their A	[No LiveLink Entity]	Standard	Administrator, Autotask	~	03/03/2010	~	18		
LogMeIn Rescue Support Session Launch	In the second se									
Managed Workplace - Central Dashboard	This LiveLink automatically logs the user into the Managed Workplace Central Dashboard, the starting point from which network resources can be managed easily. Before the LiveLink is available for use it must be published. The LiveLink can be accessed through the LiveLinks folder on the left side of the screen under any Module that it has been published for. NOTE: This Link requires some editing in order to work. See the Install Instructions for more details.									
Managed Workplace - Device Alerts	This LiveLink opens the Device alerts page for the current Installed Product in Managed Workplace. Installed - Quickly view any alerts for the device using Level Platforms Managed Workplace, now available right from ts Autotask. Before the LiveLink is available for use it must be published. NOTE: This Link requires some editing in order to work. See the Install Instructions for more details.									
Managed Workplace - Device	This LiveLink opens the Device informatic Quickly see the status of your network de right from Autotask. The username and p	n page for the current Installed Product in vices using Level Platforms Managed Worl assword are stored in the LiveLink Applicat	Managed Workplace. kplace, now available tion, so users will be	Installed Product	Standard	~Installed		10/17/2007	~	~

Change the following settings: **LiveLink Name**: ISL Online dashboard **Label**: Open ISL Online dashboard **Description**: Opens the ISL Online dashboard where you can start a new support session and see the session history for the current ticket. **Base URL**: https://autotask.islonline.com/integrations/autotask/sessions/create

Click the "**Active**" checkbox. Click "**Save & Publish**" button.

ww2.autotask.net/autotask/AutotaskExtend/livelinks/livelinkEditor.aspx?refreshlist=true&livelink_id=34							
LIVELINK™			0				
Save & Close Save & Publish	Cancel Test Live	Link					
LiveLink Name* ISL Light session start Label* Open ISL Light desbloard		Active	Execute In Debug Mode				
Description Opens the ISL Light dashboard whe support session and see the session ticket.	re you can start a new history for the current	LiveLink Application	n Name ttion] V				
Entity* Ticket			Base URL* https://autotask.isionline.com/integrations/autotask/sessions/				
Address First L Address First L Address Secon Alternate Phon Asset Value City Company Lea Company Num Company Num Company Num Company Num Company Num Company Num Company Type Competitor Configuration 1 Configuration 1 Configuration 1 Configuration 1	et ine d Line e l Source (UDF) e ber of Employees (UDF) term Battery Life (UDF) term IP Address (UDF) term IAN IP: (UDF) term Location (UDF) term Aume (UDF) term Nake & Model (UDF) term Nake (UDF)	→ insert	Querystring Values       Form Post Parameters       New       Parameter Name       Parameter Value       autotask_login_pass       autotask_login_user				

### **STEP 14** Click "**Save & Close**" button.

ww2.autotask.net/autotask/AutotaskExtend/Livelinks/livelink_publish.aspx?livelink_id=34									
LIVELINK PUBLICATION			θ						
Save & Close Scancel	Save & Close S Cancel								
LIVELINK INFORMATION									
LiveLink Name: ISL Light session start									
LiveLink Description: Opens the ISL Light dashboard w	iere you can	start a new support session and see the session history for the cu	irrent ticket.						
LiveLink Entity: Ticket									
Overview Modules Security Levels Department	s Reso	urces							
Resource Name	Resource	Security Level	Department						
Pierce, Pamela*^	~								
Thomas, Kathy		Service Desk User							
Wilson, Frank*		Service Desk User							

# **ENABLE POPUPS IN YOUR BROWSER SETTINGS**

Every supporter should disable popups or add Autotask to exceptions otherwise the LiveLinks won't work.

#### **Google Chrome**

Go to Settings > Show advanced settings > Privacy > Content settings > Pop-ups and select "Allow all sites to show popups" or add an exception "\*.autotask.com".

#### **Mozilla Firefox**

#### Go to Preferences > Content > Pop-ups

Deselect Block pop-up windows or add an exception for your Autotask URL (e.g. http://ww2.autotask.com).

#### **Internet Explorer**

https://support.microsoft.com/en-us/help/17479/windows-internet-explorer-11-change-security-privacy-settings