

# **Continuum INTEGRATION GUIDE**

Last Updated June 2014

#### **Continuum Integration Overview**

Continuum RMM is a monitoring agent designed to help report device status, including backups, back to the Continuum "ITSupport Portal Dashboard and Quick Access" monitoring dashboard. The Continuum agent monitors the eFolder backups only when the eFolder Online Backup Manager (File/Folder Backup) agent and the Continuum monitoring agent are both installed on the same device (Server or PC). The Continuum monitoring agent supports eFolder File Backup version 3.7.8 and above.

#### **Process Overview**

**Partner API Account Creation:** To integrate with the eFolder Web Portal, the Continuum configuration needs an *eFolder Partner API* user account. This account needs to be created in the eFolder Web Portal as a sub-account to the brand's Partner Senior Manager Account.

**Ticket Suppression:** There are two ticket-generating options when using eFolder—Advanced and Basic:

- Advanced Ticket-Generation: Ticketing is available through the eFolder notifications and PSA integration. This supports flexible ticket options, including auto-resolution of tickets.
- **Basic Ticket-Generation:** Ticketing is available by turning off the eFolder Partner and PSA notifications. This relies on the Continuum agents to generate tickets.

## Step 1. Create the API Account on the eFolder Web Portal

Create a Partner API account in the eFolder Web Portal using either the *New Account Wizard* or *Create Account Page*.

- 1. Log in to the eFolder Web Portal using your partner credentials.
- 2. Create a new account using the *Account Center Wizard* or the *Create Account* page:
  - a. To create an account using the *Account Center Wizard*, click **New** in the upper left corner of the *Account Center* page (see Figure 1):

| Home   | My Acc | count I  | My Partne           | ership | Accounts      | Reports   | Support   |
|--|--------|----------|---------------------|--------|---------------|-----------|-----------|
| and the second s | Action | s• 🐻 01  | ptions <del>-</del> | 🔍 Viev | v: Account De | tails 🝷 🛛 |           |
|  | ID     | Cust. ID | Brand               | Compa  | ny            | &         | User Name |

Figure 1

Page 2

| Home    | Му Асс                | ount l | My Partn  | ership       | Accounts  | Reports                      | Suppor |  |
|---------|-----------------------|--------|-----------|--------------|-----------|------------------------------|--------|--|
| 🙈 New [ | Action                | s- 🔊 0 | Account C | Center (Visi | ial View) |                              |        |  |
|         | D Cust ID Brand Compa |        |           |              |           | Account List (Detailed View) |        |  |
|         |                       |        |           |              | Create Ac | count                        |        |  |
|         |                       |        |           | Fig          | ure 2     |                              |        |  |

- 3. Choose your partnership as the existing customer:
  - a. To choose your partnership using the *New Account Wizard*, select the **New sub-account** for an existing customer radio button and select your partnership in the *Select Parent Account* field (see Figure 3):

| New Acco                                    | ount Wizard, step                        | 1 of 3                    |              |           |  |  |  |  |
|---|--|---------------------------|--------------|-----------|--|--|--|--|
| Existin                                     | g Customer?                              |                           |              |           |  |  |  |  |
| New account for a new customer              |  |                           |              |           |  |  |  |  |
| ۲   | New sub-accour                           | nt for an existing cust   | tomer        |           |  |  |  |  |
| New parent account for an existing customer |  |                           |              |           |  |  |  |  |
|   | / more parone acc                        | earrene an an analysing . |              |           |  |  |  |  |
|   | , new parene ace                         |                           |              |           |  |  |  |  |
| Salart [                                    | Parent Account                           |                           |              |           |  |  |  |  |
| Select F                                    | Parent Account                           |                           |              |           |  |  |  |  |
| Select F                                    | Parent Account<br>dataprotect            |                           | ۲ <b>۵ ×</b> | 7         |  |  |  |  |
| Select F<br>Search:<br>Cust. ID             | Parent Account<br>dataprotect<br>Company | User Name                 | First Name   | Last Name |  |  |  |  |

Figure 3

b. To choose your partnership using the New Account Page on the Accounts page, select
Existing Customer in the New Customer field and your partnership in the Existing
Customer field (see Figure 4):

| Create Account  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|
| Use this page to create a new account. You can add the account to either an existing customer or you can create a new customer along with the new account. The new account can either be a parent account or a sub-account. |  |  |  |  |  |  |
| New Customer?   Existing Customer   ▼ <td< td=""></td<>   |  |  |  |  |  |  |

Figure 4

- 4. Choose the existing contact record:
  - **a.** In the *New Account Wizard*, select the existing contact record (see Figure 5):

| ſ | Rew Account Wizard, step 2 of 3 |                              |   |  |  |  |  |  |
|---|---------------------------------|------------------------------|---|--|--|--|--|--|
|   | * Contact Record:               | Use existing customer record | ~ |  |  |  |  |  |
| l |                                 |                              |   |  |  |  |  |  |

Figure 5

**b.** On the *New Account Page*, select **Existing Contact** (see Figure 6):

| Figure 6   |
|--|
| CONTACT INFORMATION  |
| If another person is responsible for the account please select "New Contact" and change<br>the appropriate information. Otherwise the contact information will be linked with the<br>parent account's information. |
| New Contact? Existing Contact  |

- 5. Choose your partner account as the parent account:
  - a. In the *New Account Wizard*, select your partner account as the parent account (see Figure 7):



Figure 7

b. On the *New Account Page*, select your partner account as the parent account (see Figure 8):

| ACCOUNT INFORMATION   |
|---|
| You are creating a new account for an existing customer. In almost all cases you will want to create this new account as a sub-account. Please select the account that will be the parent account for this sub-account. |
| Parent Account ID: DOC0000001: dataprotection (Partner), Partn 🔻 🧼 *  |
| Figure 9  |

Figure 8

- 6. Specify a distinct username such as [yourcompany]-efolder-api.
- 7. Enter a password or check the *Link Password to Parent* checkbox.
  - a. In the *New Account Wizard*, either click **Link password to parent** or enter a password in the *Password* field (see Figure 9):

| Link password to parent: |                          |
|--------------------------|--------------------------|
| * Password:              |                          |
|                          | Generate Random Password |

Figure 9

 b. On the New Account Page, select either Linked to the Parent Account or Different from Parent Account (see Figure 10):



Figure 10

8. If you set a permanent password, in the **Must Change Pwd** option, then uncheck this option's checkbox.

- 9. If you do not want an email notification sent out regarding the newly created Web Portal account, then uncheck the **Notify User via Email** checkbox.
- 10. After the account is created, notifications from this account should be turned off. This account will *not* be used for backups, so it does not need to generate notifications. To turn off notifications:
  - a. Impersonate the account.
  - b. On the Main Menu, select **My Account > Notifications**.
  - c. Uncheck all of the notification check boxes. This account is used for API access—not backup—therefore, it has no need to generate notifications for this particular account.
  - d. Click **Save Changes** at the bottom of the page.
  - e. Click **Stop Impersonating** in the upper right corner of the page.

# Step 2. Set the Partner API Role in the eFolder Web Portal

Change the role of the newly created account to the API role:

- 1. In the Account Center, right click on the newly created account.
  - a. Navigate to **Password/Security > Set Role** (see Figure 11):



Figure 11

b. Select **Partner API** as the security role and click **Submit to save.**(see Figure 12):



Figure 12

<u>IMPORTANT!</u> It is crucial that only account(s) associated within your partner's customer ID (CID) are assigned the Partner API role. Adding a partner-level role to any of your actual customer records (existing or new accounts) gives that customer access to all your customer accounts.

For help determining the CID, please visit the following Knowledge Base (KB) article: https://secure.efoldering.com/support/index.php?/efolder/Knowledgebase/Article/View/272

## **IMPORTANT!** If a parent brand or sub-brands are involved:

- 1. If you are the parent brand and want to configure Continuum to pull in all brand and sub-brand account information, then:
  - a. Follow the above instructions only for the parent-brand's partner customer record.
  - b. Do not configure a Partner API account for each sub-brand.
- 2. If you are the sub-brand or want to otherwise configure each sub-brand to retrieve only their own customers' information, then:
  - a. Configure a Partner API account for the desired sub-brand(s).
- 3. If the parent brand is intended to pull in only its own customers' data in isolation from its subbrands, then a conversion will be needed to adjust the customers and/or brand hierarchy to essentially convert the parent brand into a sub-brand.

## Step 3. Use the eFolder API Credentials in the Continuum Monitoring Portal

1. Save the newly created eFolder API Credentials in the *Continuum ITSupport Portal Dashboard* (see Figure 13).

| API credentials to display backup | p monitoring data. Please contact eFolder Support for assist | ance.  |
|-----------------------------------|--|--|
|                                   |  |  |
| *                                 |  |  |
| •                                 |  |  |
|                                   |  |  |
|                                   | API credentials to display backu                             | API credentials to display backup monitoring data. Please contact eFolder Support for assist |

Figure 13

2. To update credentials at a later time, navigate to **Quick Access > Backups > eFolder** and click the **Update Credentials** button in the upper right corner (see Figure 14).

|                | -                             |                    |                            | Updates                          | Update Gredentials |                |
|----------------|-------------------------------|--------------------|----------------------------|----------------------------------|--------------------|----------------|
| dly Kama       | User Name                     | Brand              | Remote<br>2014-04-07 12:51 | Backup Destination<br>Local-Disk | Network Server     | Ticket #       |
| Update Credent | ials<br>t eFolder support for | assistance with AP | I credentials.             | 014-03-22 17/50                  |                    | (Ticket 201404 |
| Password:      |                               |                    | Cancel Save                | *                                |                    |                |

Figure 14

## Step 4. Configure or Suppress Continuum Ticket Generation in the Continuum Portal

If the eFolder-ConnectWise Integration is being used for advanced ticket generation and management, the eFolder-Continuum Ticket generation should be turned off.

 Find the Level and Policy: Navigate to Setup Tab > Extensions menu > IntelliMon Alerts > Configure Suppression. Find the Backup family. Then, modify either the Global Policy or the Site Policy (see Figure 15).

| A Setup Home <              | IntelliMon Alert Configuration           |                                   |                       |                       | Download InteliMon Docume    |
|-----------------------------|--|-----------------------------------|-----------------------|-----------------------|------------------------------|
| - Essentials                |  |                                   |                       | (Filmetaux Fault)     | lautau Sumula II dautau Sumu |
| My Company Details<br>Users | Configuration changes will be updated in | nmediately to the agents selected |                       |                       |                              |
| Notifications               |  | 201220                            |                       | Suppression Policy    |                              |
| Fix & Reboot Schedules      | Family                                   | Total Policies                    | Global                | Site Level            | Resource Level               |
| liter                       | Active Directory Advance Monitoring      | 10                                | 4 Policies Configured | 1 Policy Configured   | 1 Policy Configured          |
| intes                       | Active Directory Monitoring              | 77                                | 1 Policy Configured   | 1 Policy Configured   | 63 Policies Configured       |
| Extensions                  | Antivirus                                | 9                                 | 4 Policies Configured | 2 Policies Configured | 2 Policies Configured        |
| falwarebytes                | Backup                                   | 11                                | 1 Policy Cogfigured   | No Policy Configured  | 4 Policies Configured        |
| SA Integration              | Blackberry                               | 24                                | No Policy Co          | 1 Policy Configured   | 1 Policy Configured          |
| aple                        | Blackberry/Exchange                      | 7                                 | 1 Policy Configured   | No Policy Configured  | 1 Policy Configured          |
| ouis                        | Citrix/Terminal Server                   | 21                                | No Policy Configured  | No Policy Configured  | 1 Policy Configured          |
| ntelliMon Alerts            | Continuum Vault                          | 17                                | No Policy Configured  | No Policy Configured  | 3 Policies Configured        |
| Igent Version Update        | Device / Interface monitoring            | 2                                 | No Policy Configured  | No Policy Configured  | 1 Policy Configured          |
| Monitoring                  | DHCP                                     | 12                                | No Policy Configured  | 1 Policy Configured   | 1 Policy Configured          |
| having                      | Disk space monitoring                    | 5                                 | 1 Policy Configured   | No Policy Configured  | 4 Policies Configured        |
| evices                      | Email monitoring                         | 3                                 | No Policy Configured  | No Policy Configured  | 1 Policy Configured          |
| Email Monitoring            | Exchange                                 | 230                               | No Policy Configured  | No Policy Configured  | 1 Policy Configured          |
| lymantec Backup Exec        | Exchange 2007                            | 57                                | No Policy Configured  | 1 Policy Configured   | No Policy Configured         |
|                             | Exchange Preventive Check                | 8                                 | No Policy Configured  | 1 Policy Configured   | No Policy Configured         |
|                             | Hardware                                 | 655                               | No Policy Configured  | 2 Policies Configured | 2 Policies Configured        |
|                             | Hotfix                                   | 12                                | 1 Policy Configured   | No Policy Configured  | No Policy Configured         |
|                             | IIS                                      | 11                                | No Policy Configured  | No Policy Configured  | No Policy Configured         |
|                             | ISA Server                               | 13                                | No Policy Configured  | No Policy Configured  | No Policy Configured         |
|                             | Linux                                    | 1                                 | No Policy Configured  | No Policy Configured  | 1 Policy Configured          |
| V .                         | A NOC Managed Desktops                   | 2                                 | No Policy Configured  | 1 Policy Configured   | 1 Policy Configured          |



2. **Suppress the Continuum Alert:** At this point, the Global Policy should already be configured, so click the **Already Configured** tab. Find the *eFolder backup failed* alert, place a checkmark under the

Add column, and fill in a reason in the Enter Reason field. Then click Add (see Figure 16).

| undelle annuer controller annue   |                            |  |
|---|----------------------------|--|
| Configure New (10) Already Configured (1)   |                            |  |
| Global Suppression Configuration  |                            |  |
| The Global Suppression rule will overwrite the existing suppression rule if configured for site level and resource level configuration for the selected alert name. |                            |  |
| Please hover over the Alert Name or Alert Classification for the Alert Description  |                            |  |
| Alert Name  | Alert Classification       |  |
| Backup - Vault Looix backup failed.   | Critical Impact Alerts     |  |
| eFolder backup failed   | Critical Impact Alerts     |  |
| Intronis backup job failed  | Critical Impact Alerts     |  |
| The Backup-to-Disk device is out of free space. (Symantec/Veritas)  | Critical Impact Alerts     |  |
| VaultLogix backup failed for desktop  | Critical Impact Alerts     |  |
| Backup Exec - Backup failed due to an error (Symantec/Veritas).   | Critical Non-Impact Alerts |  |
| Backup Exec - Insert media into the slots (Symantec/Veritas).   | Critical Non-Impact Alerts |  |
| Backup Exec - Media error : Insert media into the drive (Symantec/Veritas).   | Critical Non-Impact Alerts |  |
| Please remove the media from the drive and Respond OK.(Symantec/Veritas).   | Critical Non-Impact Alerts |  |
| Zenith BDR backup failed  | Others                     |  |
| Enter Reason  |                            |  |
| Do not require the alerts   | $\hat{}$                   |  |
| Add   |                            |  |

Figure 16

 View Backup Status: Select the Quick Access > Backups tab. For help with determining the icons under the Backup Destination columns, use the legend located in the upper right corner (see Figure 17).

| 🗄 Servera 🛛 👼 Desktop                   | 🖌 📕 Hobile Devices 🛛 🏴 | Other Devices | um Vault                    | ackups 🔒              | Secure Information Done                        | N  |                |             |            |
|---|------------------------|---------------|-----------------------------|-----------------------|--|--|----------------|-------------|------------|
| wholder                                 |                        |               |                             |                       |  |  |                |             |            |
| Select Site 1                           | Al Stee                |               | •                           |                       |  |  | Update (       | Credentials | (a) 🖬 🖬    |
|   |                        |               |                             |                       |  |  |                |             |            |
|   | 10000                  |               | 10000000000                 | 12.12                 |  | Backup Cestination   |                |             |            |
| Site Name                               | Resource Name          | Friendly Name | User Name                   | Brand                 | Remote   | Backup Destination<br>Local-Disk   | Network Server | Ticket #    |            |
| Site Name                               | Resource Name          | Friendly Name | User Name                   | Brand                 | Remaile  | Backup Destination<br>Local-Disk   | Network Server | Ticket #    |            |
| Site Name<br>Desktoptest Heb<br>SA-Demo | Resource Name          | Friendly Name | User Name<br>ceapi<br>jp123 | Brand<br>city<br>city | Remete<br>2014-04-07 12:51<br>2014-02-05 00:34 | Backup Cestination<br>Local-Disk<br>2054-03-19 16:04<br>2054-03-29 16:04 | Network Server | Ticket #    | e70001875) |

| Legends        | × |
|----------------|---|
| Successful     | 0 |
| Failed         | • |
| Warning        |   |
| Disabled       | 1 |
| In Maintenance | 2 |

Figure 17

## **Conclusion**

The integration between eFolder and Continuum monitoring platform allow you to streamline your support processes and automate your alerting processes.

#### **Additional Assistance**

We will assist you any way that we can. Please submit questions to <u>support@efolder.net</u>, call us at 800-352-0248, or browse our Knowledge Base at <u>https://secure.efoldering.com/support/kb/</u>.

