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):

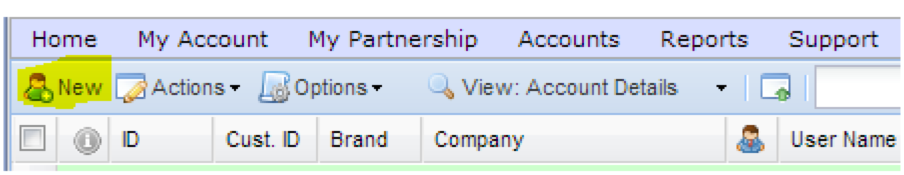


Figure 1

b. To create an account using the Main Menu, select **Accounts > Create Account** (see Figure 2).

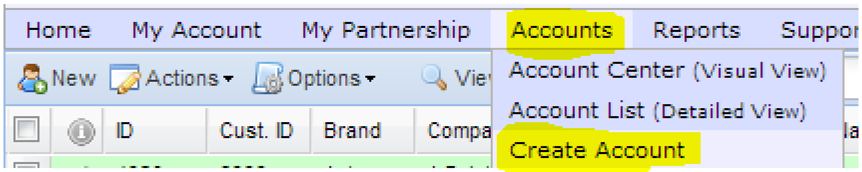


Figure 2

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):

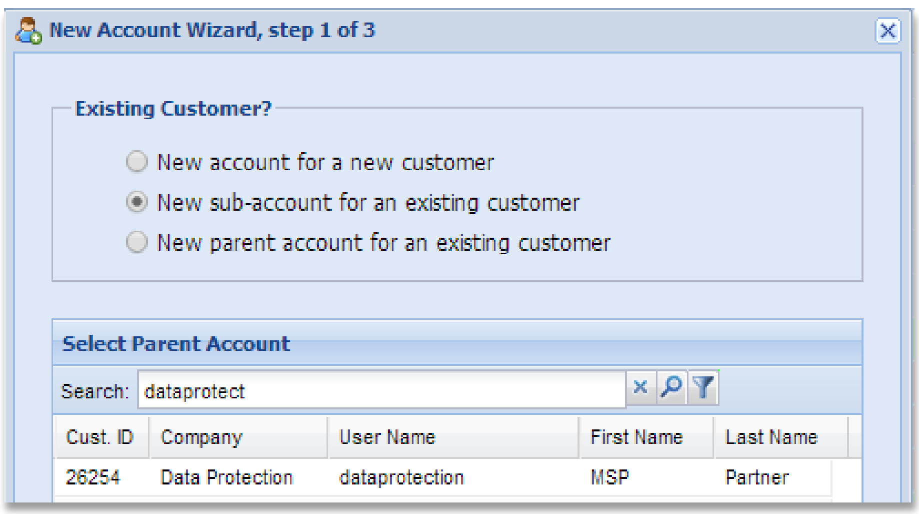


Figure 3

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):

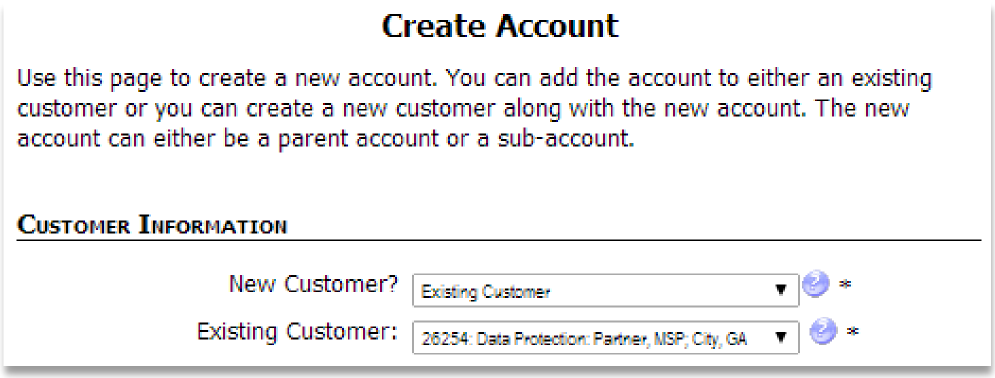


Figure 4

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

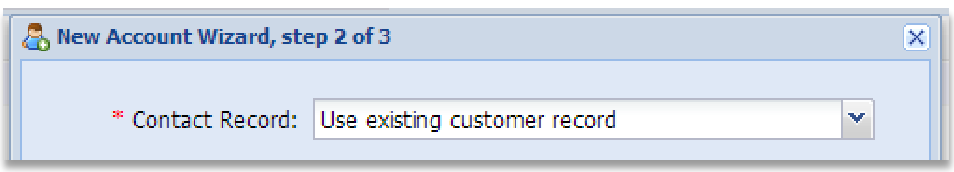
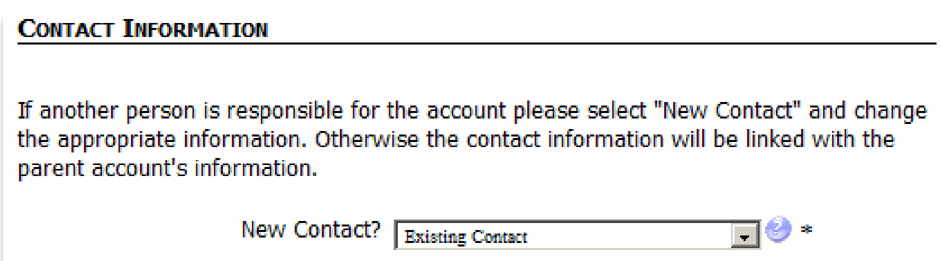


Figure 5

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

Figure 6



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):

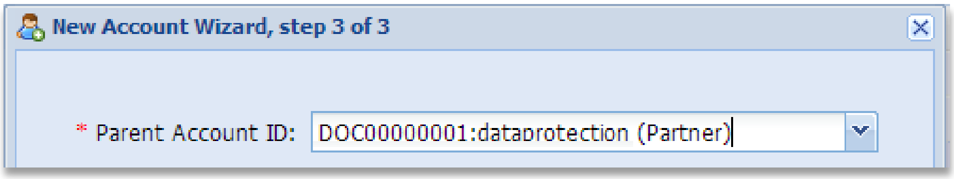


Figure 7

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

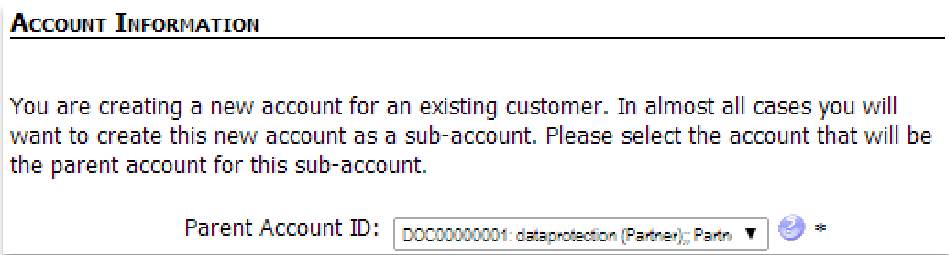


Figure 8

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):

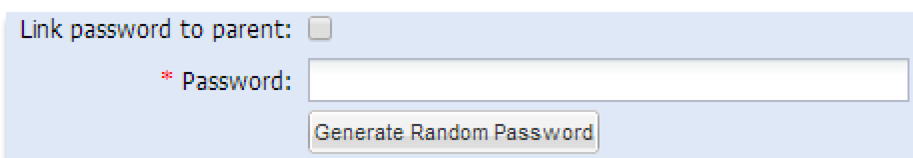


Figure 9

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

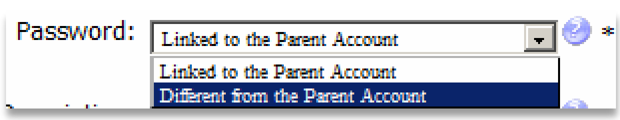


Figure 10

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):

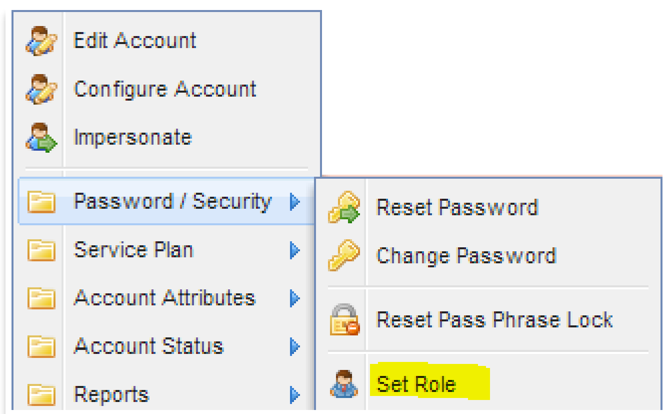


Figure 11

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

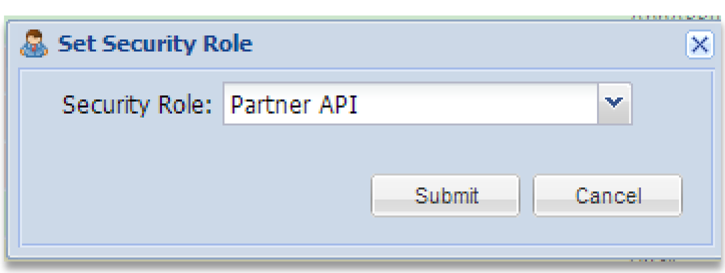


Figure 12

<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

<u>IMPORTANT!</u> 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 sub-brands, then a conversion will be needed to adjust the customers and/or brand hierarchy to essentially convert the parent brand into a sub-brand.

<u>Step 3. Use the eFolder API Credentials in the Continuum Monitoring Portal</u>

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

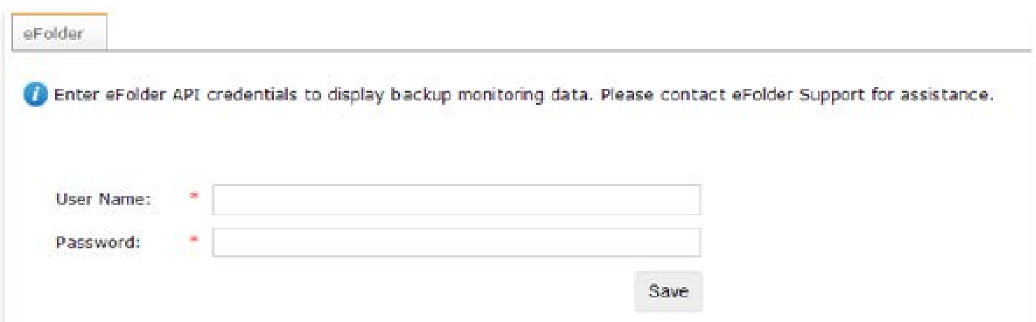


Figure 13

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).

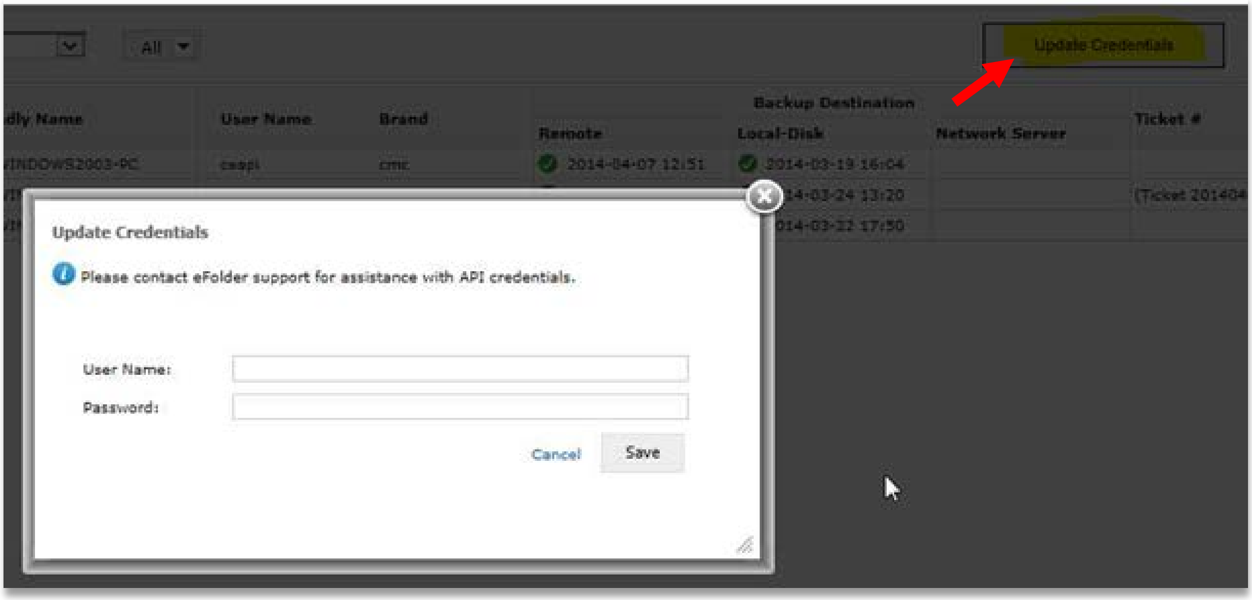


Figure 14

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.

1. **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).

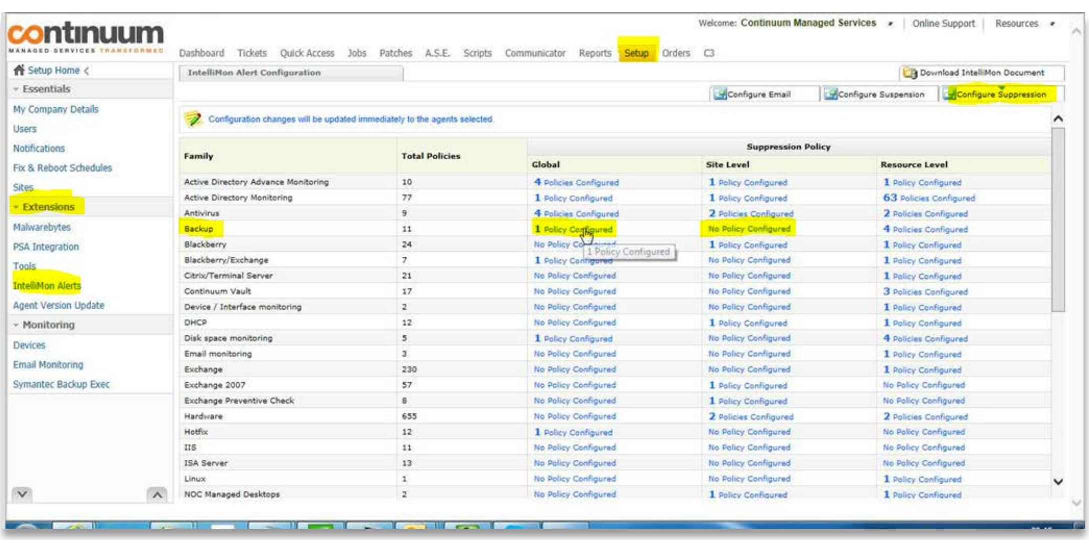


Figure 15

2. **Suppress the Continuum Alert:** At this point, **t**he 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).

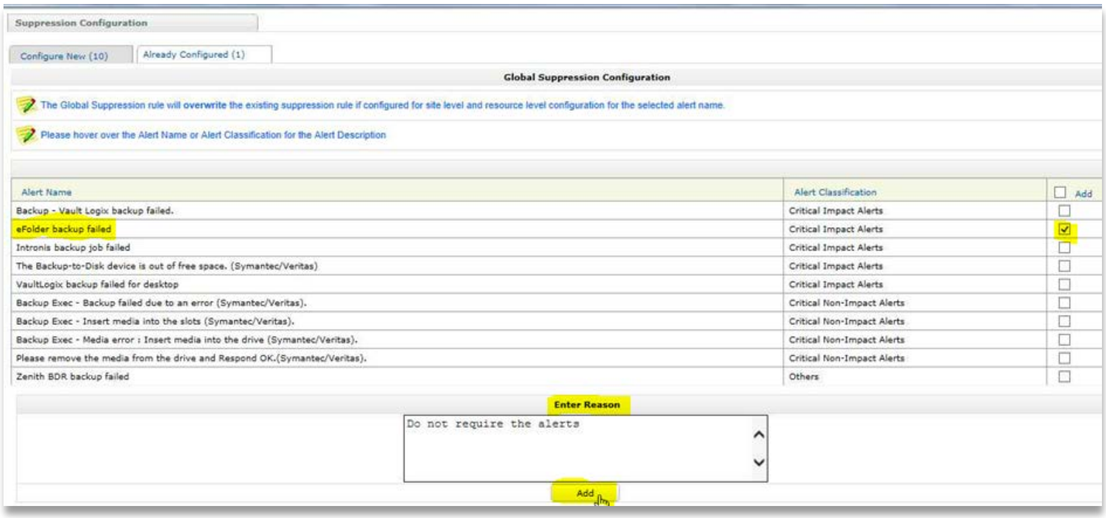


Figure 16

3. **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).

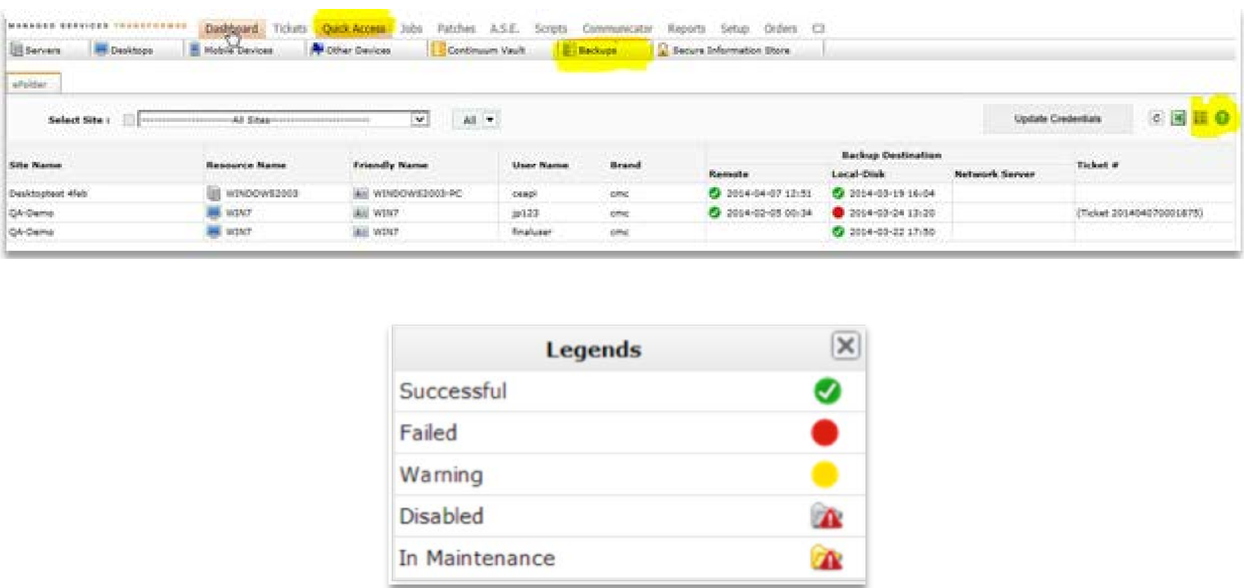


Figure 17

<u>Conclusion</u>

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 support@efolder.net, call us at 800-352-0248, or browse our Knowledge Base at https://secure.efoldering.com/support/kb/.