



## Setting up Lifecycle Insights for Datto Autotask PSA Data Integration

### Total Estimated time: Less than 15 minutes

The purpose of this document is to instruct you how to configure both Autotask and Lifecycle Insights (LCI) so that data integration can occur between the two platforms. The integration with Autotask can work both ways. Specifically - Account, User and Asset (Configuration) data is pulled from Autotask. And optionally, you can write back Warranty Expiration dates from LCI to Autotask.

This document is broken down into two sections.

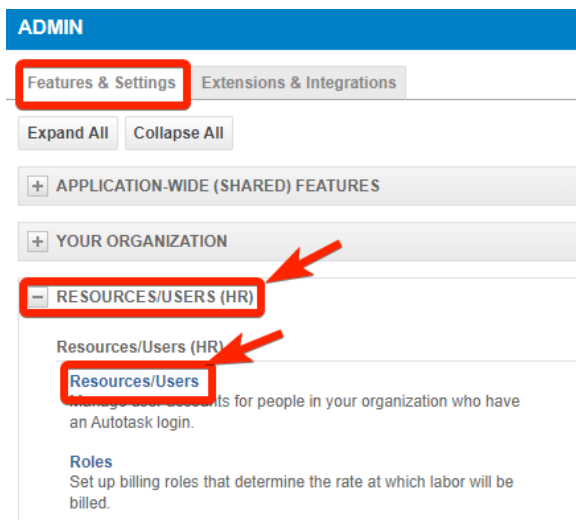
- Autotask Configuration
  - You will need to create/define an API user account in Autotask.
- Lifecycle Insights Configuration
  - You will enter the API credentials into Autotask Configuration panel in Lifecycle Insights

## Autotask Configuration

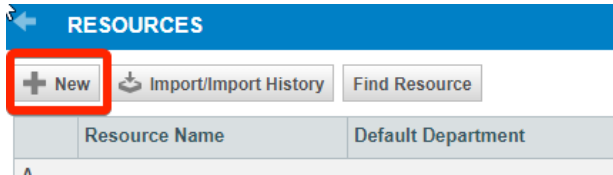
### Estimated Time: < 10 minutes

Lifecycle Insights requires API credentials to connect to Autotask. The following outlines the steps to define the API user. You must have Admin rights in Autotask to perform these steps.

Once logged into Autotask, go to **Admin**, expand **RESOURCES/USERS(HR)** and select **Resources/Users**. All of these options are in the **Features & Settings** tab.



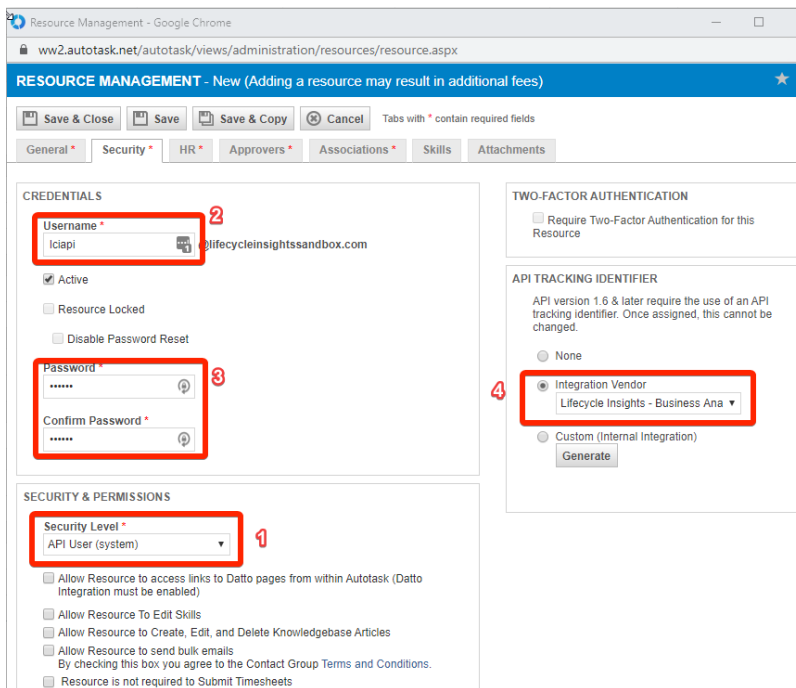
Click the **New** button.



Once you click New, a new dialog window will appear. There are a number of required fields that you must enter for the new user, including First Name, Last Name, Email address, etc. These are Autotask requirements that must be completed.

Once you fill out the required fields in the **General** tab, click on the **Security** tab. Fill out the fields in this order:

1. **Security Level** – Select **API User (system)**
  - a. You may create a custom security level by copying the API User (System) security level. See **Setting up a Custom Security Level** in next section.
2. **Username** – Enter value (IE. Iciapi)
3. **Password** and **Confirm Password** – Enter unique, strong password
4. **API Tracking Identifier** – Select Integration **Vendor** radio button, then select: **Lifecycle Insights – Business...**



Click **Save**. There a number of other Autotask Required fields to fill out. You will be prompted as to which ones. Please fill them out and **Save and Close** when done.

**Make sure you copy/write down the full username and password. You will need this information when setting up integration in LCI.**



### Setting up a Custom Security Level

Autotask comes with a default security level for API accounts – called API User (System). You will likely want to use a more restricted security level. If this is the case, make a copy of the API User (System) security level, and make the appropriate modifications as noted below.

1. Go to Autotask **Admin** page
2. Expand **RESOURCES/USERS (HR)**
3. In the Security section, click on **Security Levels**
4. Right click on API User (System) (API-only) and click **Copy Security Level**
5. **Name** the security level (IE. LCI API User)
6. Click **No Permission** for the following entities:
  - a. Contracts
  - b. Projects
  - c. Service Desk
  - d. Timesheets
  - e. Reports
  - f. Other
7. Under **Admin** – ensure only the following two items are checked:
  - a. **Products & Services**
  - b. **Configuration Items**
8. Under **Inventory**
  - a. Set all values to None or No, EXCEPT...**Products / View**. Set that to **All**
9. Under **CRM**
  - a. Set the values as outlined below

CRM Full Permission | No I

Account & Contact Access

Object	Permission
Customer & Cancelation	All
Vendor & Partners	All
Prospects, Leads, & Dead	All

The "Mine" setting for accounts allows the user to see all accounts where they are the account manager or a member of the account team. The "My Territories" setting also includes "Mine".

Object Permissions (for accounts you have access to)

Object	View	Add	Edit	Delete
Accounts	see above	None	None	None
Contacts		None		
Opportunities & Quotes	None	None	None	None
Sales Orders	None	not applicable	None	None
Configuration Items & Subscriptions	All	None	All	None
Configuration Item Notes			All	None
Notes	Yes	None	None	None
To-Dos	Yes	None	None	None
Attachments	None	None	not applicable	None



10. After saving and closing, you can then associate this security level to the API user you created earlier.

\*\* These custom security settings are subject to change as we introduce features to LCI. As an example our roadmap calls for pulling in Project information and potentially creating opportunities or tickets. If/when that occurs, we will notify you and recommend additional security changes.

(continued on the next page)



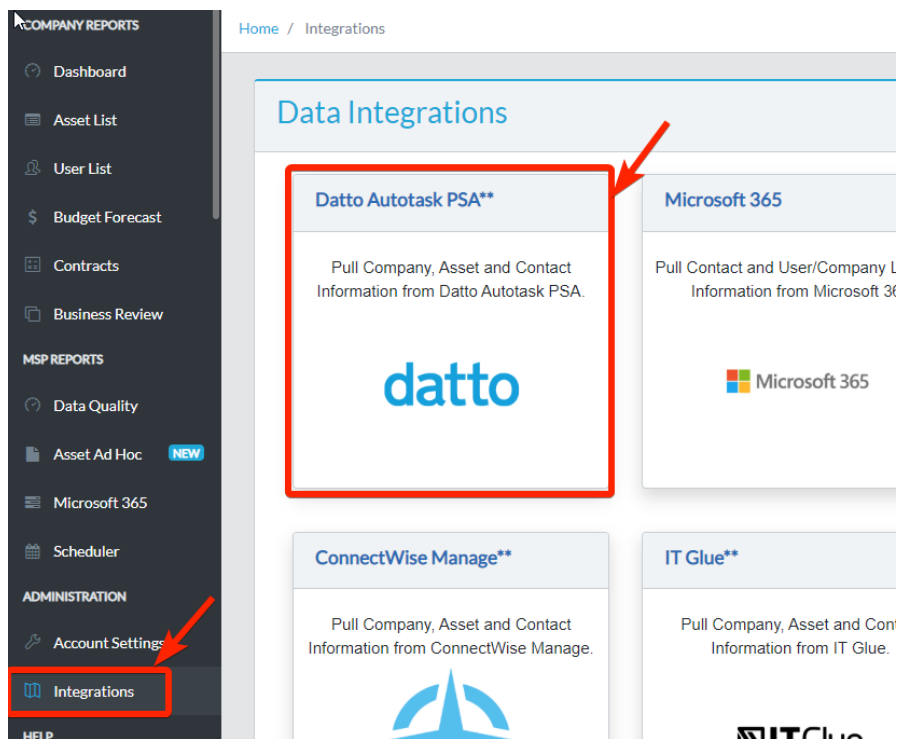
## Lifecycle Insights Configuration

### Estimated time: < 5 minutes

There are two data points you will need to configure Autotask with Lifecycle Insights. You must have Admin rights in LCI to perform these steps.

- API Username
- API User Password

1. Log into Lifecycle Insights using the username and password you created in the previous section. The login URL is: <https://master.lifecycleinsights.io/signIn>.
2. Once logged in, notice the Left Navigation pane has an **Integrations** Option under **Administration**. Click on **Integrations**, and your main content pane will show the list of available integration sources. Choose **Autotask**



3. Next, please fill in the form
  - a. Check Autotask Integration Active
  - b. Enter the API Username (Exactly as you set up in Autotask)
  - c. Enter the API password (Exactly how you set it up in Autotask).



## Datto Autotask PSA Settings

Settings and Pull Log   Asset Mapping   Company Mapping   Asset Status Mapping

**Configuration Settings for Autotask Data Integration**   [Configuration Instructions](#)

Autotask Integration Active   When **Checked**, the integration will be considered **Active** and Lifecycle Insights will update data **Nightly**.

  Enter the API User Name As Specified in Autotask

  Enter the API Password As Specified in Autotask

4. Click **Test Settings**. You should see a message 'Connection Successful.' If you do not, please email us.
5. Click **Save Settings**. If this is the first time you are saving your credentials, and the **Autotask Integration Active** box is checked... LCI will immediately launch into the initial sync process.

Note: Once the Autotask configuration is set up, it can take up to 1 hour for the initial data sync. This delay only occurs on the initial sync. You should receive an email once the initial sync is complete.