



Text



Autotask/vCIOToolbox Setup

Save & Close

Save

Save & Copy

Cancel

Tabs with * contain required fields

General *

Security *

HR *

Approvers *

Associations *

Skills

Attachments

CREDENTIALS

Username *

vintegrator

@vciotoolboxsandbox.com

☒ Active

Password *

Confirm Password *

Security Level *

API User (system) ▼

☐ Allow Resource to access links to Datto pages from within Autotask (Datto Integration must be enabled)

☐ Allow Resource To Edit Skills

☐ Allow Resource to Create, Edit, and Delete Knowledgebase Articles

☐ Allow Resource to send bulk emails
By checking this box you agree to the Contact Group [Terms and Conditions](#).

☐ Resource is not required to Submit Timesheets

Outsourcing Permissions *

None ▼

TWO-FACTOR AUTHENTICATION

☐ Require Two-Factor Authentication for this Resource

Option 1 - AuthAnvil

AuthAnvil offers a strong authentication platform to cover multiple assets (including Windows network, production devices and web-based software) with a single solution, allowing you to consolidate security management and token use. It also provides a source of new revenue by allowing you to manage strong authentication for client assets on the same platform. To learn more about AuthAnvil Two-Factor Authentication or sign up, [click here](#)

Option 2 - CRYPTOCARD Tokens

Option 3 - TOTP (Google Authenticator, etc.)

Time-based one-time password

API TRACKING IDENTIFIER

API version 1.6 & later require the use of an API tracking identifier. Once assigned, this cannot be changed.

☒ None

☐ Integration Vendor

vCIOToolbox - QBR software & r ▼

☐ Custom (Internal Integration)

Generate

Autotask Setup

1. The account needs to be setup as an API user and set to the tracking account for vCIOToolbox

Admin > Resources/Users > Security > Security Level **(API User - System)**

and then, go to

API Tracking Identifier > Integration Vendor **(VCIOToolbox)**

Then go to Admin >
Features & Settings >
Resource/Users (HR) >
Protected Data
Permission

RESOURCES/USERS (HR)

Resources/Users (HR)

Resources/Users
Manage user accounts for people in your organization who have an Autotask login.

Roles
Set up billing roles that determine the rate at which labor will be billed.

Departments
Set up organizational entities in your company that are associated with resources and work types, and play a role in project security.

Workgroups
Assemble ad-hoc teams independent of departmental structure.

Holiday Sets
Enter the schedule of holidays your company will observe / your office will be closed.

Time Off Policies
Manage the time off categories and the number of days or hours in each category your resources are entitled to at each length of service tier.

Timesheet Approvers
Set up the resources who will approve other resources' timesheets.

Expense Report Approvers
Set up the resources who will approve other resources' expense reports.

Weekly Billable Hours Goals
Configure the number of resource hours per week that are supposed to be devoted to billable labor

Security

Security Levels
Configure the access levels to Autotask features that can be assigned to your resources.

Protected Data Permission
Set up read/write/edit permissions for your resources for protected data in Site Configuration UDFs and Configuration Items.

CRYPTOCARD Two-Factor Authentication
Implement CRYPTOCARD Two-Factor Authentication for all or selected resources.

Single Sign On (OpenID Connect (OIDC))
Configure single sign on (SSO) using OpenID Connect.

Privacy Action History
View history of user actions related to privacy regulations.

Then confirm on that page that your integrator/API account is set for edit unprotected data and to view protected data

← PROTECTED DATA PERMISSION					
<div>SaveCancel</div>					
Resource Name	Edit Protected Data	View Protected Data	Edit Unprotected Data	View Unprotected Data	
Administrator, Autotask	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Anderson, Scott	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
APIUser, VCIOToolbox	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Brown, Michael	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Davis, Gary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Integrator, vCIOToolbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Jackson, Timothy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Johnson, Allison	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Jones, Cindy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Miller, Susan^	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Moore, James*	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Pierce, Pamela**	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Smith, Matthew	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Taylor, Mark*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Thomas, Kathy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
White, John	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Williams, Steve	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Wilson, Frank^	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Setup Your Settings in vCIOToolbox

1. Enter the QBR or GRC module


2. Navigate to Integration > Settings

3. Choose Datto Autotask

The screenshot shows the vCIOToolbox interface with the following components:

- Top Navigation Bar:** Includes tabs for KAM, QBR, GRC, Projects, CX, POLICY, and University. The QBR and GRC tabs are highlighted with a pink box.
- Left Sidebar:** Contains navigation links for Dashboard, Customers, Roadmap Summary, Meeting Calendar, Reporting, Templates, Assets, Integrations, Policies, and Admin. The Integrations link is highlighted with a pink box.
- Integrations Section:** Divided into Primary and Secondary categories. The Primary category includes tiles for ConnectWise Manage, Datto Autotask (highlighted with a pink box), Kaseya BMS, Syncro MSP, Halo PSA, and Atera. The Secondary category includes tiles for IT Glue, N-Able N-Central, ServiceNow, Microsoft SSO, Nodeware, Phin, HubSpot, KnowBe4, Salesforce, Hudu, ConnectSecure, NinjaOne, Qualys, and Infima.

Setup Your Settings in vCIOToolbox

 **Datto Autotask**

Autotask Username
vintegrator@vcio.toolboxsandbox.com

Autotask Password
.....

1. Set up your API credentials

Autotask Default Ticket Queue
IT:Change Requests-29682969 *Set by system

Autotask Default Opportunity Assignee
Pamela^A Pierce-29682885 *Set by system

Autotask Default Opportunity Stage Queue
Stage 1 First Contact-29682770 *Set by system

Autotask Default Ticket Priority
High-1 *Set by system

Autotask Default Account Filter
Customer-1 *Set by system

Autotask Default Import Opportunity Status
Active-1, *Set by system

Autotask Default Zone
https://webservices2.autotask.net/ATServices/1.6/atws.wsdl *Set by system

Autotask Default Contract Type (Optional)
Time & Materials-1,Fixed Price-3, *Set by system

Autotask Default Contract Category (Optional)
IT:Time & Materials-7,SW:Block Hour-16,SW:Time & Materials-21, *Set by system

Autotask Default Import Asset Type
Import All-all, *Set by system

Primary Asset Source
Nable

Primary Opportunity Source
Autotask

2. Set up your asset and opportunity source

SAVE SETTINGS

Setup Your Settings in vCIOToolbox

cybrance

KAM QBR GRC Projects CX POLICY University

Memory usage: 201 MB

ADMIN_QA_AT_TEST

Datto Autotask Sync

Autotask Username **vintegrator@vcitoolboxsandbox.com**, Autotask Password **hidden** [Update Settings](#)

Autotask Default Ticket Queue **IT:Change Requests** [Update](#)

Autotask Default Opportunity Assignee **Pamela^A Pierce** [Update](#)

Autotask Default Opportunity Stage Queue **Stage 1 First Contact** [Update](#)

Autotask Default Ticket Priority **High** [Update](#)

Autotask Default Account Filter **Customer** [Update](#)

Autotask Default Import Opportunity Status **Active** [Update](#)

Autotask Default Contract Type (Optional) **Time & Materials,Fixed Price** [Update](#)

Autotask Default Contract Category (Optional) **IT:Time & Materials,SW:Block Hour,SW:Time & Materials** [Update](#)

Autotask Default Import Asset Type **Import All** [Update](#)

Zone **https://webservices2.autotask.net/ATServices/1.6/atws.wsdl**

[Sync Customers - Customer](#) [Sync Assets](#) [Sync Tickets](#) [Sync Contacts](#) [Sync Opportunities](#) [Sync Agreements](#) [Sync Locations](#)

1. Navigate to Integrations > Autotask Sync

2. Configure your Autotask Settings

Setup Your Settings in vCIOToolbox

Datto Autotask Sync

Autotask Username **vintegrator@vcitoolboxsandbox.com**, Autotask Password **hidden** [Update Settings](#)

Autotask Default Ticket Queue **IT:Change Requests** [Update](#)

Autotask Default Opportunity Assignee **Pamela^A Pierce** [Update](#)

Autotask Default Opportunity Stage Queue **Stage 1 First Contact** [Update](#)

Autotask Default Ticket Priority **High** [Update](#)

Autotask Default Account Filter **Customer** [Update](#)

Autotask Default Import Opportunity Status **Active** [Update](#)

Autotask Default Contract Type (Optional) **Time & Materials, Fixed Price** [Update](#)

Autotask Default Contract Category (Optional) **IT:Time & Materials, SW:Block Hour, SW:Time & Materials** [Update](#)

Autotask Default Import Asset Type **Import All** [Update](#)

Zone **https://webservice2.autotask.net/ATServices/1.6/atws.wsdl**

[Sync Customers - Customer](#) [Sync Assets](#) [Sync Tickets](#) [Sync Contacts](#) [Sync Opportunities](#) [Sync Agreements](#) [Sync Locations](#)

1. After set up, sync your customers