



**How-To Guide**

# **Integrate ConnectWise Manage with Netsurion Open XDR**

**Publication Date**

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## Abstract

This guide provides instructions to configure and integrate ConnectWise Manage with Netsurion Open XDR to retrieve its logs and forward them to Netsurion Open XDR.

**Note:**

The screen/ figure references are only for illustration purpose and may not match the installed product UI.

## Scope

The configuration details in this guide are consistent with ConnectWise Manage and Netsurion Open XDR 9.1 or later.

## Audience

This guide is for the administrators responsible for configuring and monitoring ConnectWise Manage in Netsurion Open XDR.

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## 1 Overview

ConnectWise Manage is a business process automation platform that allows your business to sell, service, and support technology efficiently in a more streamlined way. The business management tool allows your business to centralize all information, automate business processes, real-time visibility in operations, and provide better customer support.

## 2 Prerequisites

1. Netsurion Open XDR Version 9.1 or later must be installed along with respective ConnectWise related Open XDR updates.
2. The system where the Netsurion Open XDR Manager is installed should be public-facing (Internet) and the application should be running with HTTPS protocol.
3. The SSL certificate that is used in Netsurion Open XDR Web console must be a trusted one.
4. ConnectWise Manage Version 2019.3 or later must be installed.

## 3 Integrating ConnectWise Manage with Netsurion Open XDR

Many Netsurion Open XDR users are using ConnectWise Manage to create cases and track the ticket status as well as the ticket history. Integrating ConnectWise Manage with Netsurion Open XDR helps the users in viewing and tracking the cases created in the Netsurion Open XDR “**Casebook**” and in the **ConnectWise Manage** platform. This avoids the hassles of switching between two different platforms.

## 4 Creating Tickets for ConnectWise

The tickets in ConnectWise can be created from the **Netsurion Open XDR Web console under Incident module**.

## 5 Mapping and Terminologies

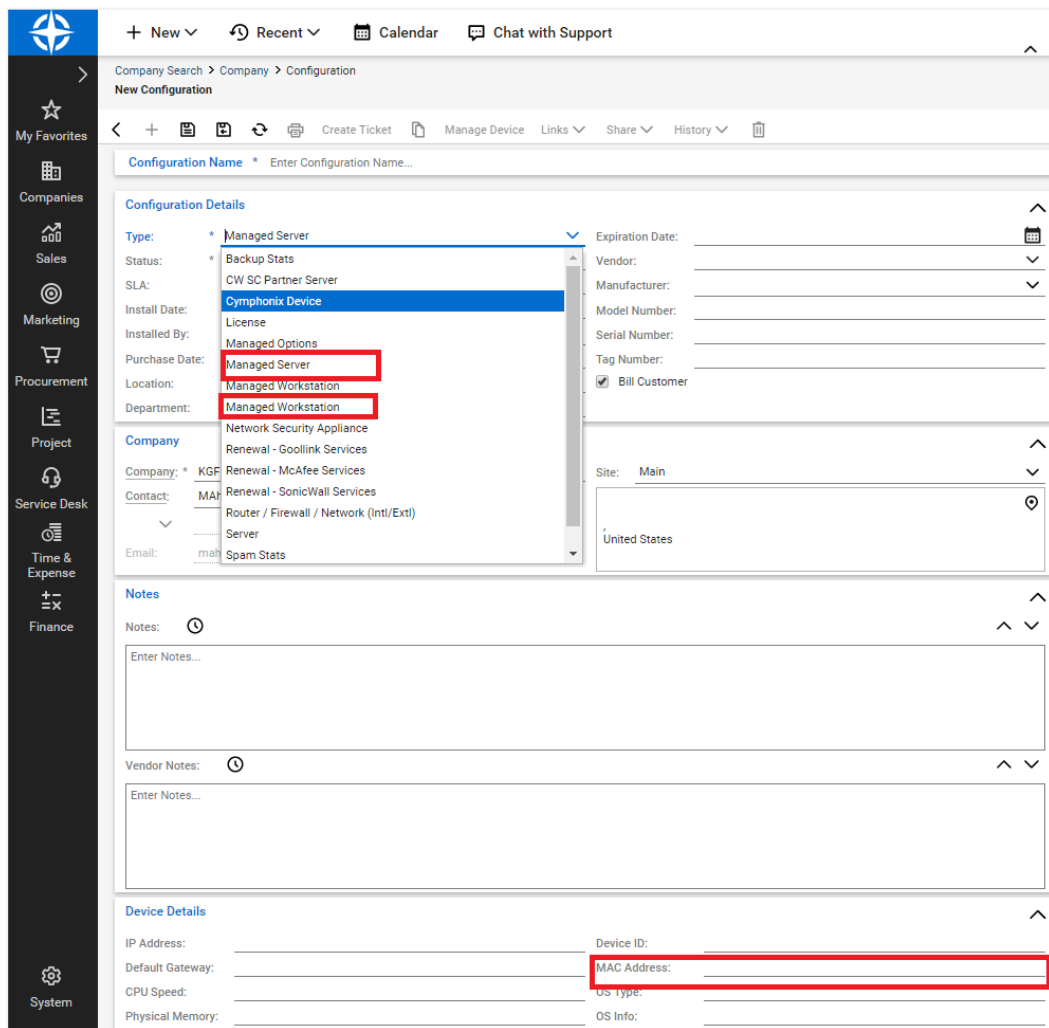
Netsurion Open XDR	ConnectWise Manage
Group	Company
Systems	Configurations
Cases	Tickets

ConnectWise integration can be achieved through auto-mapping as well as manual mapping of Netsurion Open XDR Groups and Systems with ConnectWise Companies and Configurations respectively.

**Note**

- Multiple Netsurion Open XDR Groups can be linked to a single Company in ConnectWise Manage.
- Multiple Netsurion Open XDR Systems can be linked to a single Configuration in ConnectWise Manage when mapped manually. However, during auto-mapping, only one System is linked to one Configuration.

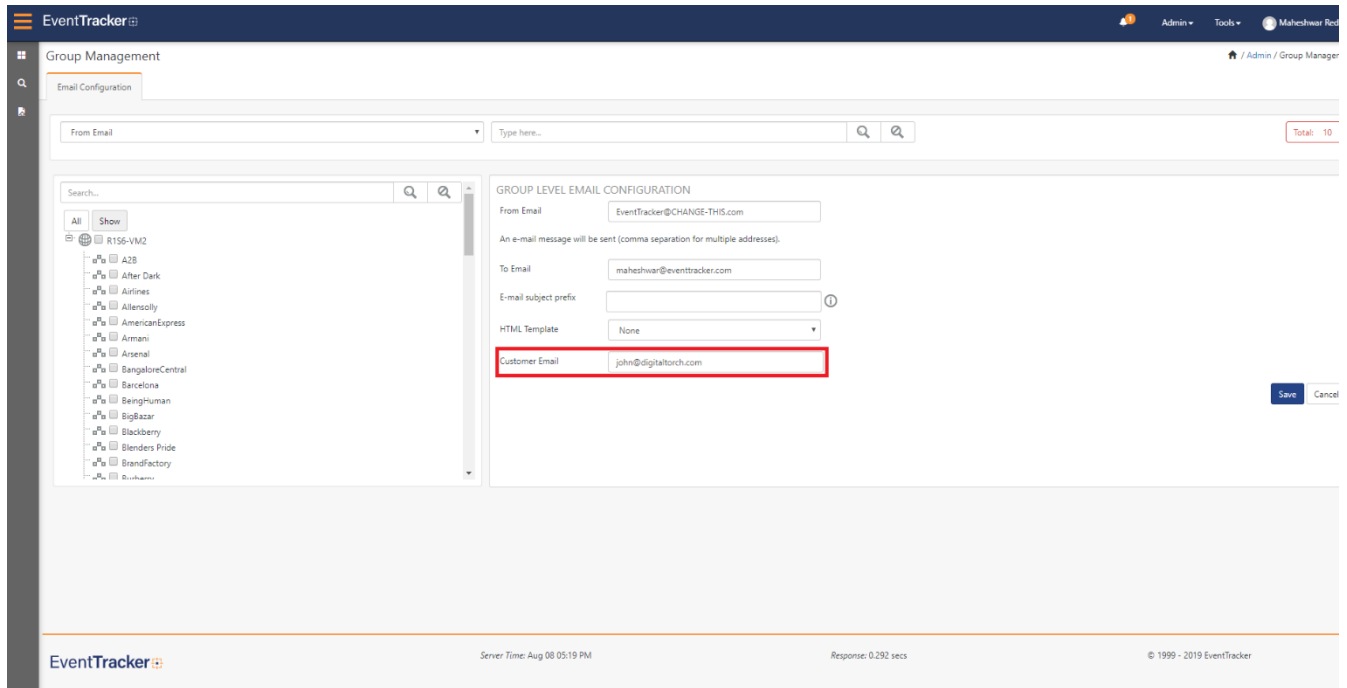
1. After applying the update ET91U19-032, login to the Netsurion Open XDR Web console and go to **Admin > PSA Integration**, and check if any existing PSA instance is available. If found, then delete it and reconfigure the new instance of the PSA integration.
2. While adding new configuration in ConnectWise Managed company, the MAC address field is displayed only on selecting the Managed Server or Managed Workstation type.



## 6 Integration Steps for Auto-Mapping

### 6.1 Prerequisites for Auto-Mapping

1. The customer's email is configured for the selected group under **Group Management** as shown in the following figure.



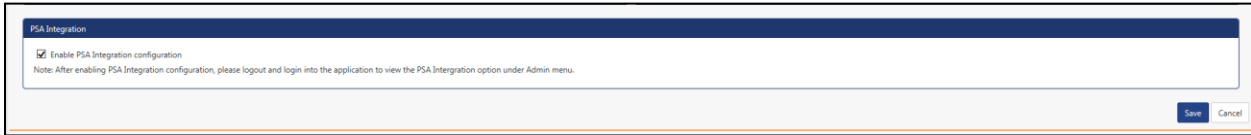
2. The above configured email must be also configured in the respective ConnectWise Manage company's primary contact details.
3. Reporting Netsurion Open XDR agent's MAC addresses are added in the respective configurations in the ConnectWise Manage company.
4. The reporting Netsurion Open XDR agent's MAC addresses are registered in the Netsurion Open XDR console.

**Note:**

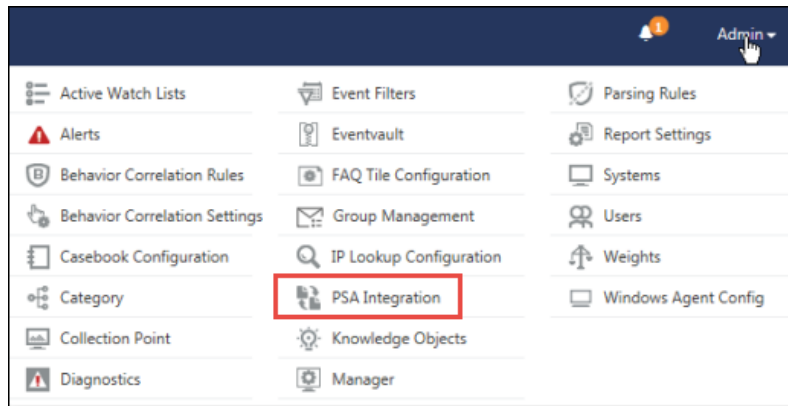
- Auto mapping of the group and company is done through the email domain matching. So only domain name needs to be same between group and the company.
- Auto mapping of the system and configuration is done through the MAC address matching. Auto mapping of systems works only for Windows systems as only Windows systems MAC addresses are registered through Netsurion Open XDR agent. Other sensor types such as syslog are not auto mapped since they do not carry MAC addresses. They all need to be mapped manually.

## 6.2 ConnectWise Configuration and Integration

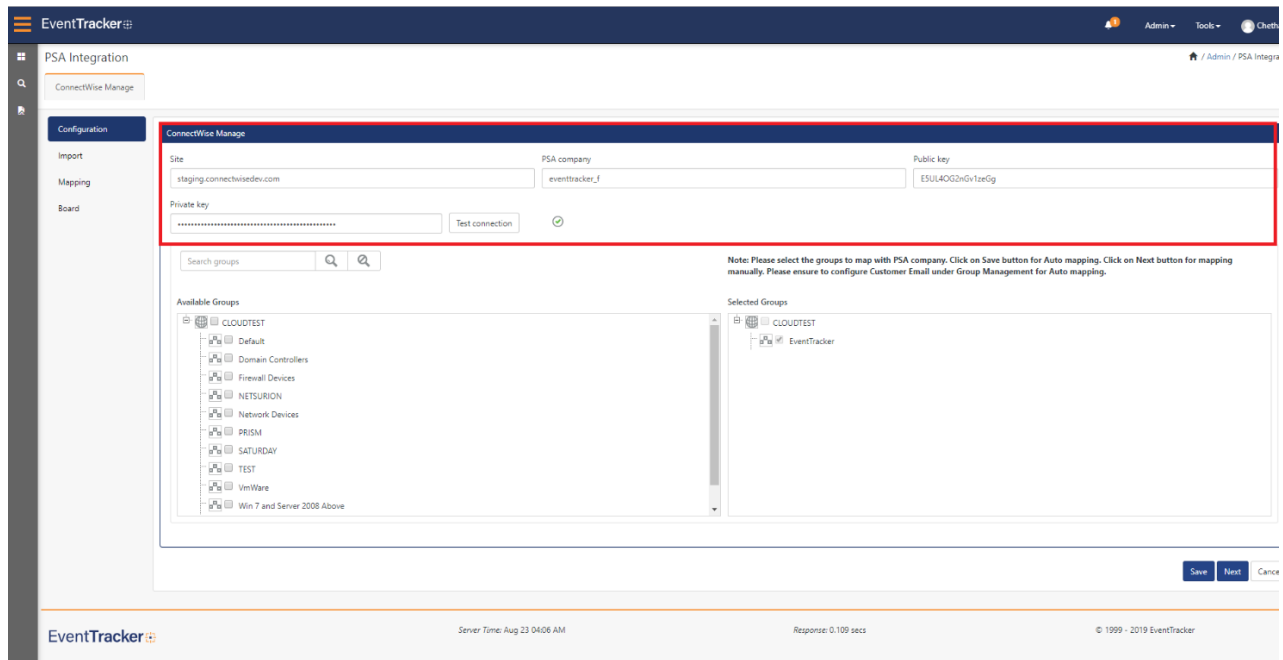
1. To enable the **ConnectWise Manage** in Netsurion Open XDR, login to the Netsurion Open XDR **web> Admin> Manger**.
2. Enable the checkbox **“Enable PSA Integration configuration”**.



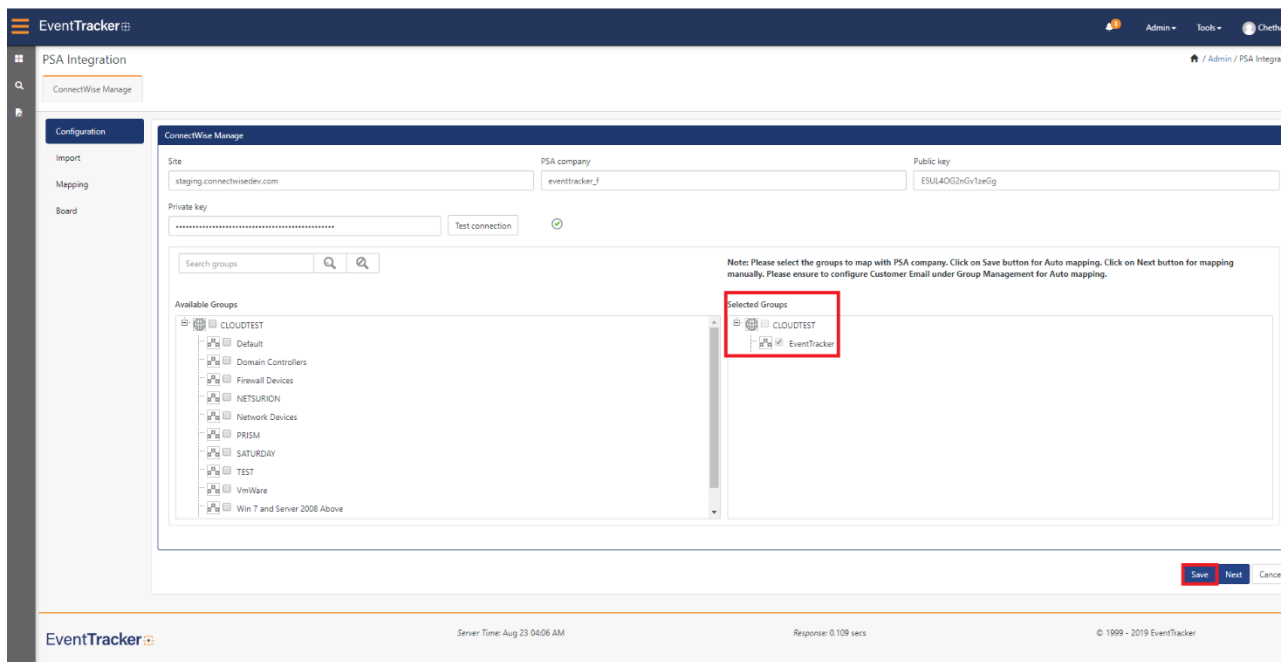
3. The **“PSA Integration”** option is enabled in the **Admin** dropdown.



4. Netsurion Open XDR Administrator needs to contact the ConnectWise Manage portal member and get the credentials (API Keys) to connect to a specific instance.
5. Login to the Netsurion Open XDR web, navigate to **Admin** and select the **PSA Integration** option.
6. Enter all the required inputs in the ConnectWise Manage page and click the **Test Connection** button. Once the connection is successful the green color indication is displayed.

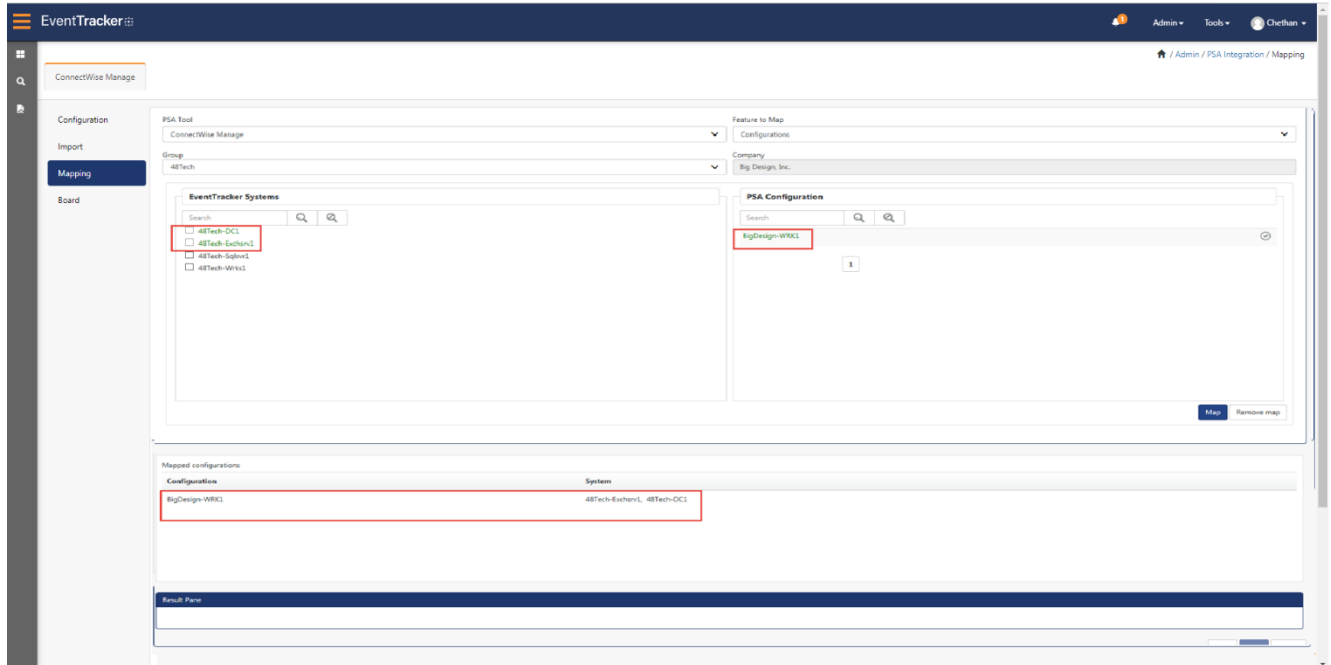


7. Select the groups from the available group list that are to be mapped and then click the **Save** button to auto-map.



8. In the mapping section, all the mapped entities are listed in Green color and is shown in the Mapped Companies/Configuration pane.





9. At any point in time, you can take out the mapping by selecting the **Remove map** option.

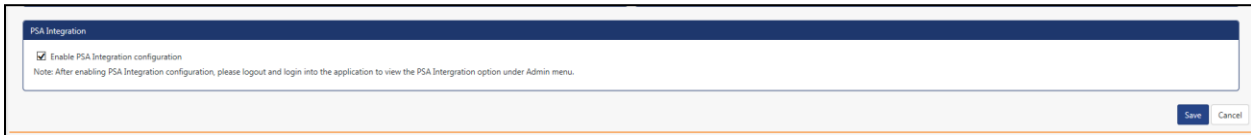
**Note:**

- Any failures during Auto-mapping are reported as Events/Alerts based on the configuration. If you have access to the console logs, please view the log to know the progress of the Auto-mapping and any failures. All mapped groups/companies and systems/configuration is visible in the “Mapping” section. In case there are any corrections to be done for mapped entities, you can remove the map for those entities and map those entities through manual mapping.
- In case the Auto-mapping of Groups and Companies fails, please follow the manual mapping steps for mapping the Groups with Companies. Refer to the below sections for manually mapping Groups and Companies. Once the manual mapping of Groups with Companies is done, click on the “Save” button in the mapping screen to Auto-map the systems and Configurations. All failures are reported as Events/Alerts based on the configuration. If you have access to the console logs, please view the log to know the progress of the Auto-mapping and any failures.
- By default, the Auto-map is initiated every 6 hours.

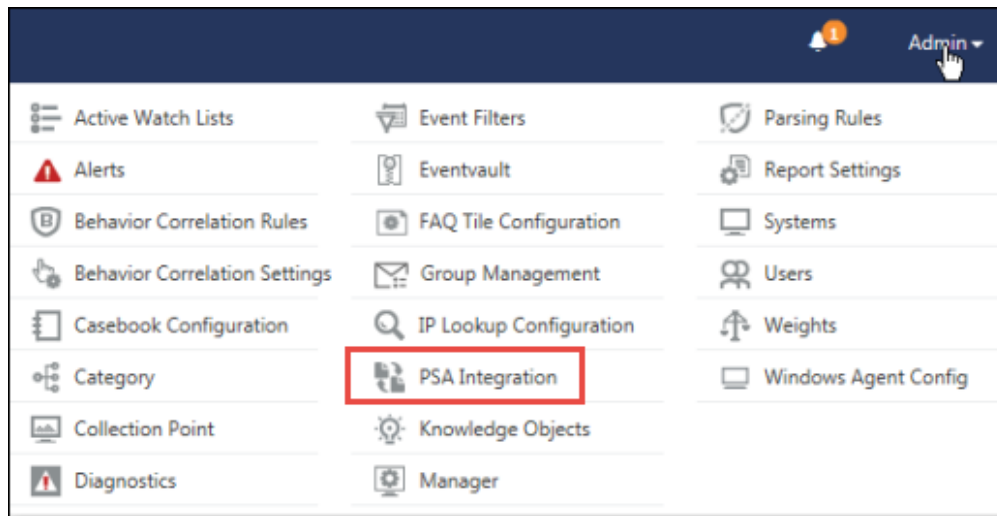
## 7 Integration Steps for Manual Mapping

### 7.1 ConnectWise Configuration and Integration

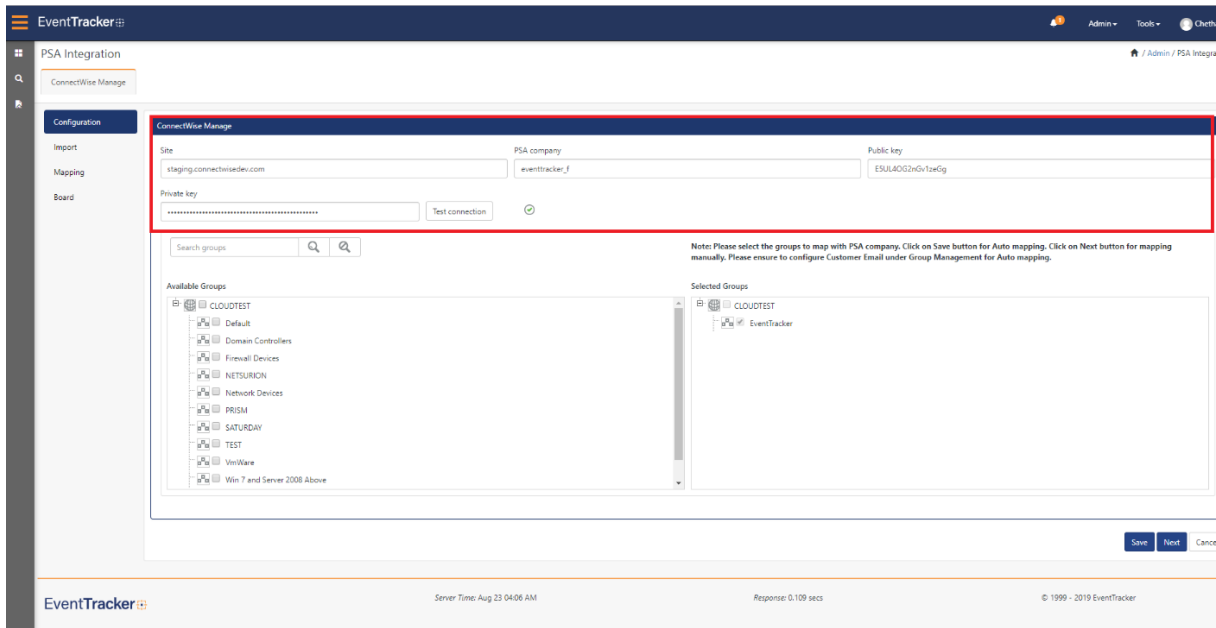
1. To enable the **ConnectWise Manage** in Netsurion Open XDR, login to the **Netsurion Open XDR web > Admin > Manager**.
2. Enable the checkbox **“Enable PSA Integration configuration”**.



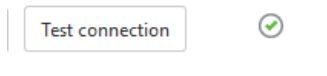
3. The **“PSA Integration”** option is enabled in the **Admin** dropdown.



4. Netsurion Open XDR Administrator needs to contact the ConnectWise Manage portal member and get the credentials (API Keys) to connect to a specific instance.
5. Login to Netsurion Open XDR web, navigate to **Admin** and select the **PSA Integration** option.
6. Enter all the required inputs in the ConnectWise Manage page and click the **Test Connection** button.

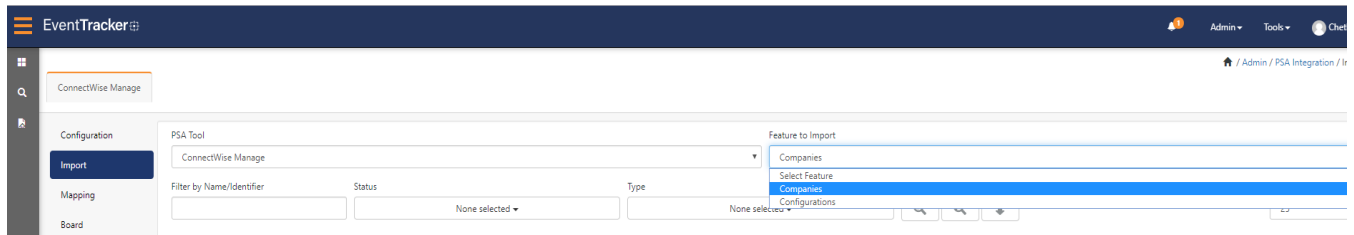


7. Once the connection is successful the green color indication is displayed as shown below:

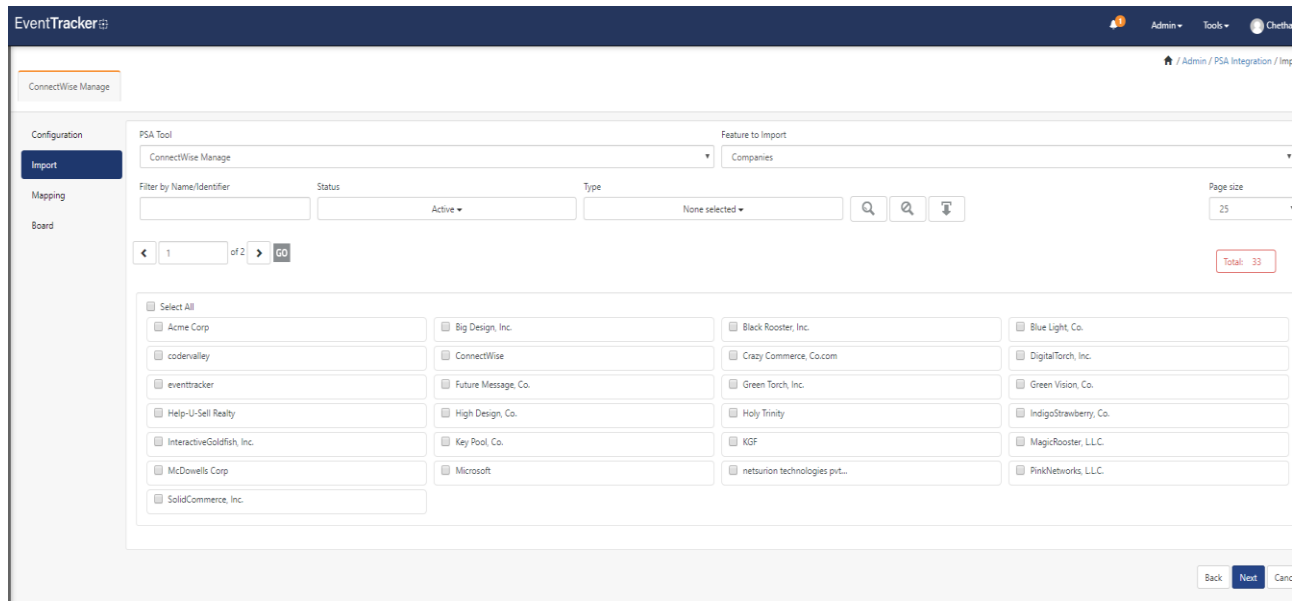


## 7.2 Manual Mapping of Groups and Systems

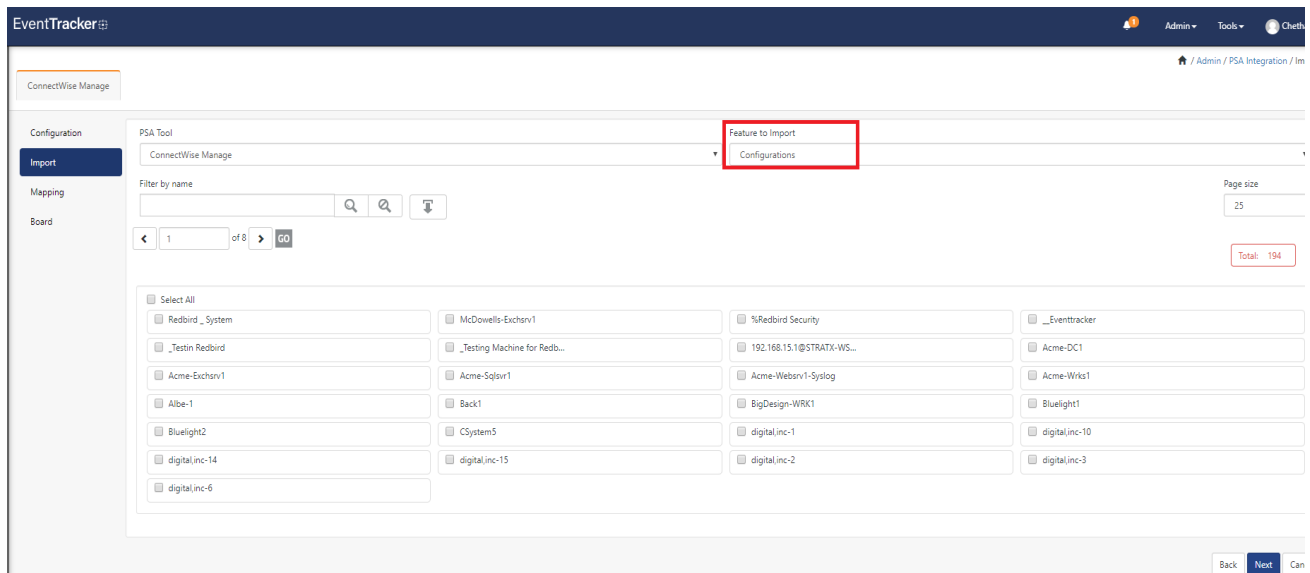
1. Select the groups from the available group list that are to be mapped and click the **Next** button.
2. In the PSA Tool dropdown, select **ConnectWise Manage**.
3. In the **Feature to Import** field, select **Companies**.



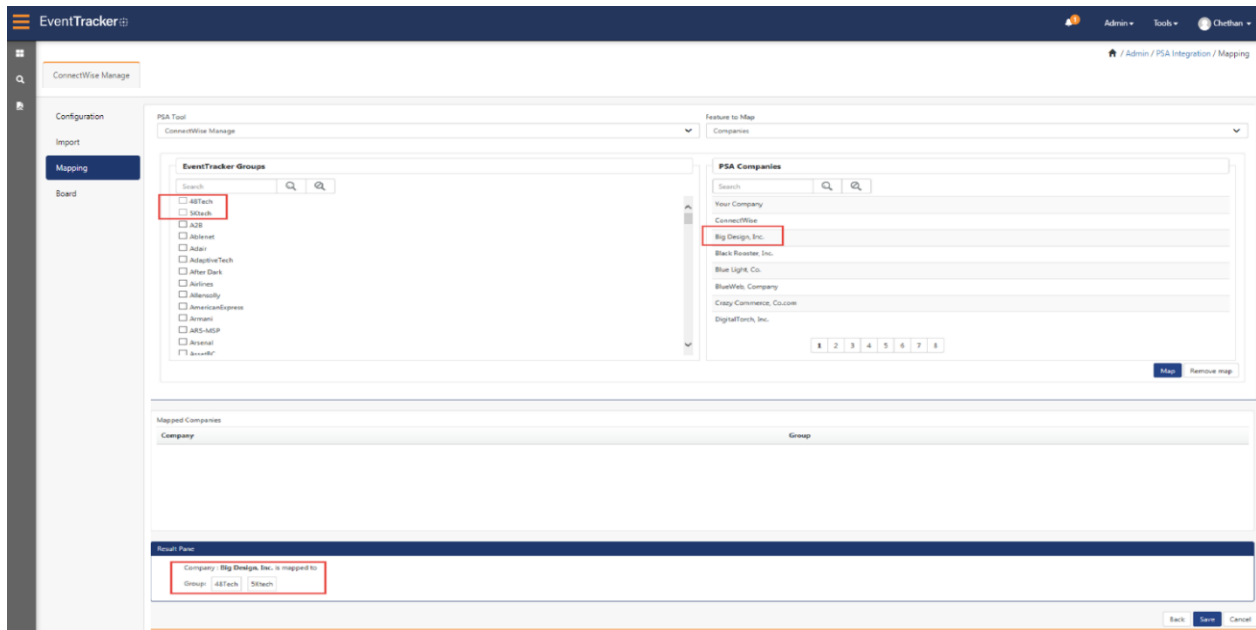
4. Filter the companies by Name/Identifier or Status.
5. Click **Import**.



- Similarly, to import configurations, select **Configurations** option from the dropdown, click **Import**, and then click **Next**.

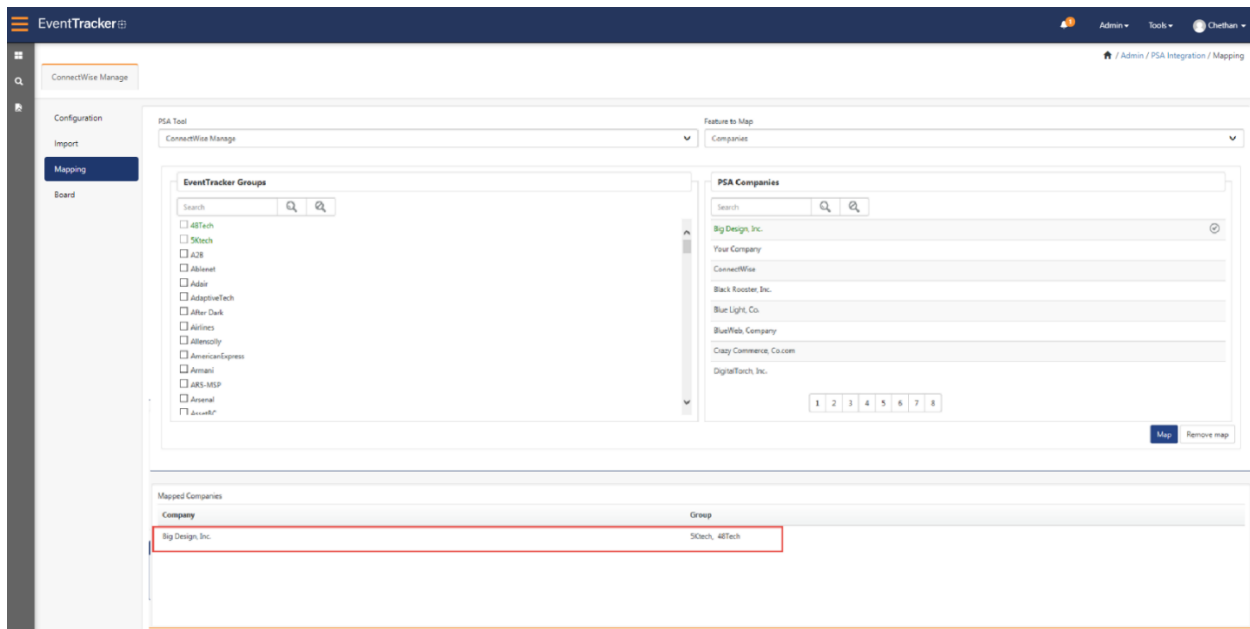


- In the **Feature to Map** field, select the companies.
- Select Groups from the left pane and Companies from the right pane. In our example, we have mapped the group “48Tech and 5Ktech” to “Big Design, Inc.”
- Click **Map**.
- The mapped groups and companies are listed in the result pane as highlighted in the figure below.
- Once the mappings are done, save it.



**Note:**

In case there are already some groups that are mapped to companies, it gets listed in green color and is shown in the mapped company's pane.

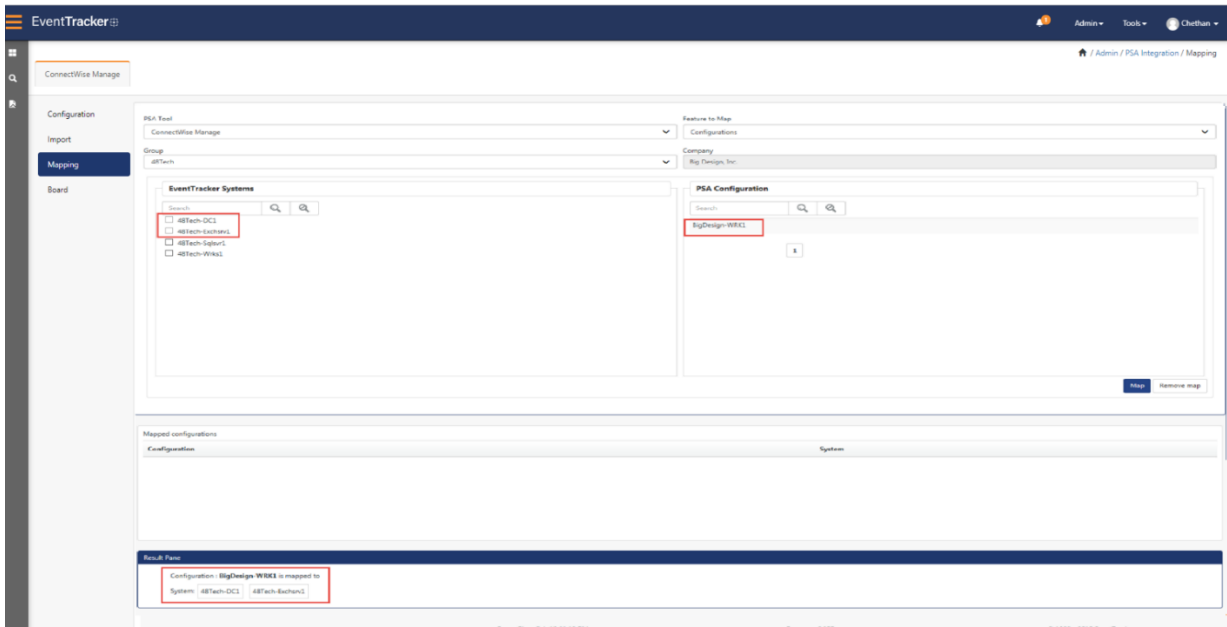


12. In the **Feature to Map** field, select **Configurations**.
13. Select the respective group from the dropdown list.

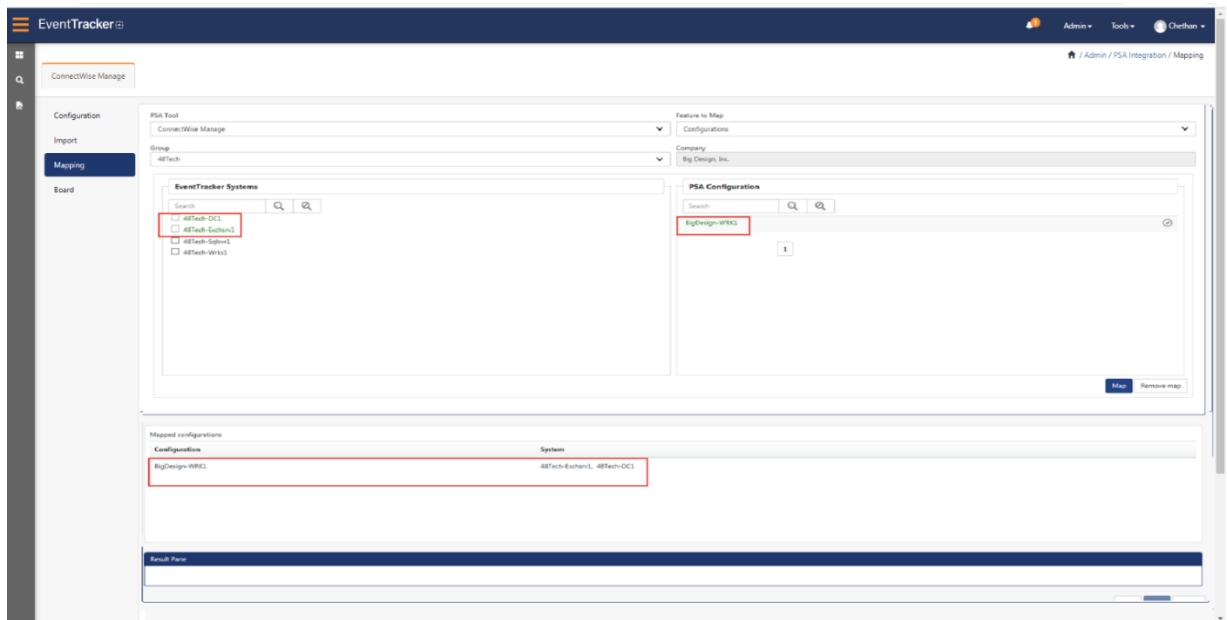
**Note:**

Only the groups selected for the respective company is listed here.

14. Select the Netsurion Open XDR systems from the left pane and the PSA configuration in the right pane. In our example, we are mapping the “48Tech-DC1 and 48Tech-Exchsvr1” system to “BigDesign-Wrk1” configuration.
15. Click **Map**.
16. The mapped system and configuration are listed in the result pane as highlighted in the figure below.
17. Once the mappings are done, save it.



**Note:**  
Only the groups selected for the respective company is listed here.



18. At any time, you can remove the mapping by selecting the **Remove map** option.

## 8 Board Configuration

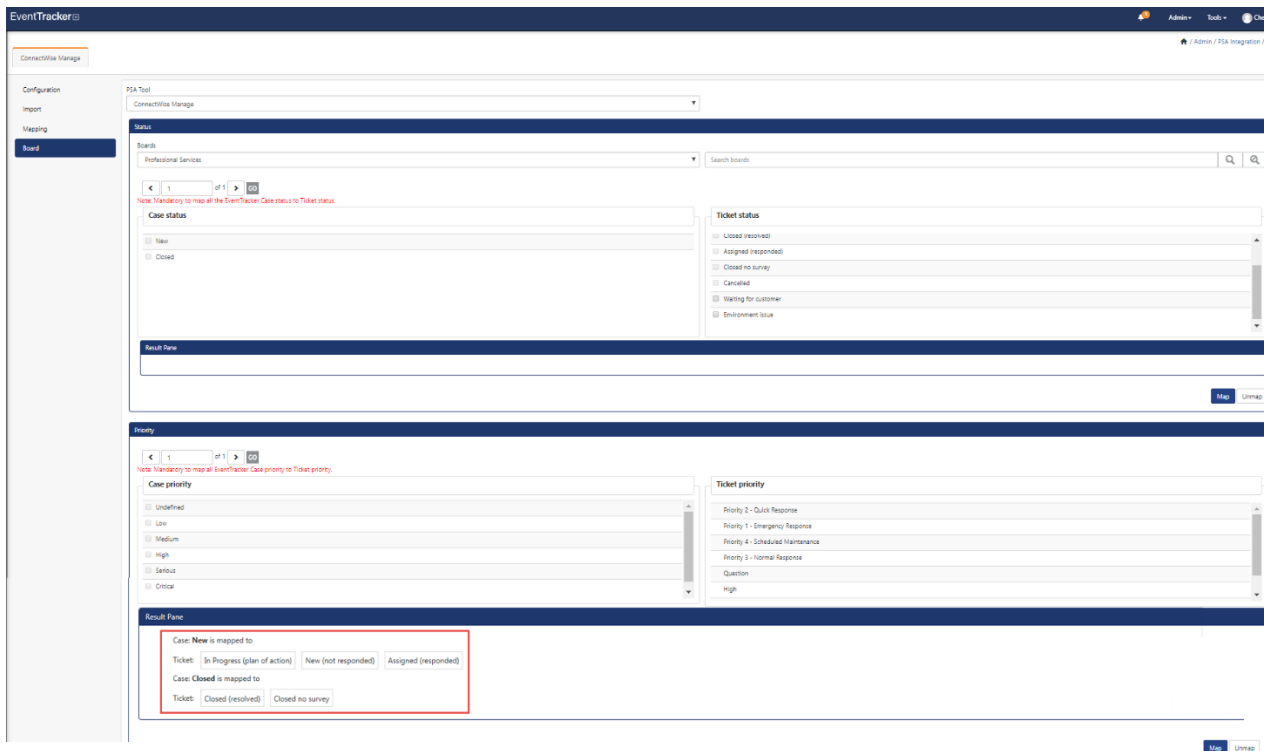
### 8.1 Status

1. Navigate to the **Board** tab where you can map the ticket status of ConnectWise Manage with the Case status of Netsurion Open XDR and vice-versa.
2. Select the appropriate board from the dropdown options.
3. Select the **Ticket status** from the left and **Case status** from the right pane and then click **Map**.

**Note:**

It is mandatory to map all the ticket status with the case status.

4. The mapping can be viewed in the result pane.



5. Click **Save**.

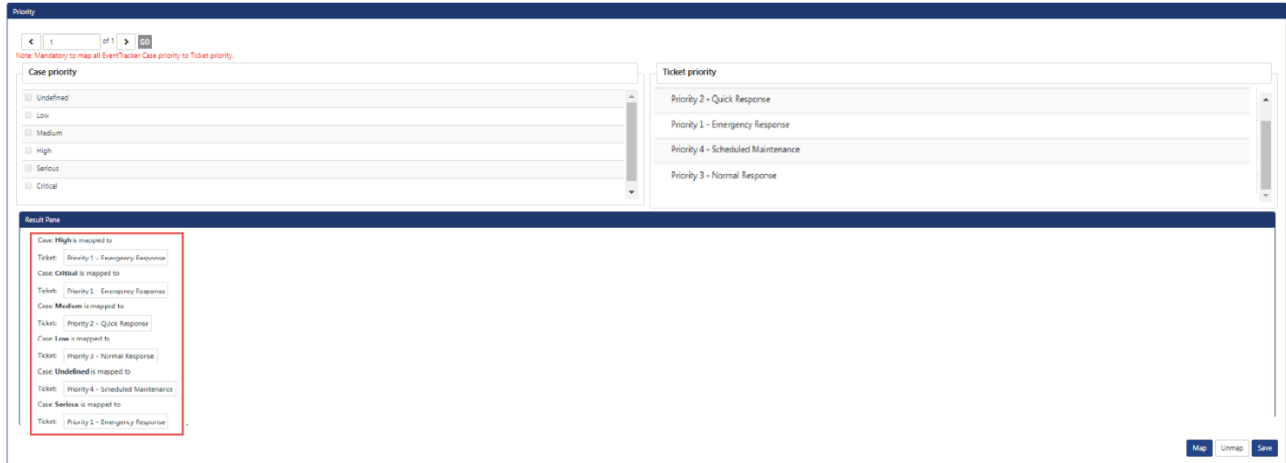
### 8.2 Priority

1. Select the **Ticket priority** from the left and **Case priority** from the right pane and then click **Map**.

**Note:**

It is mandatory to map all the ticket status with the case priority.

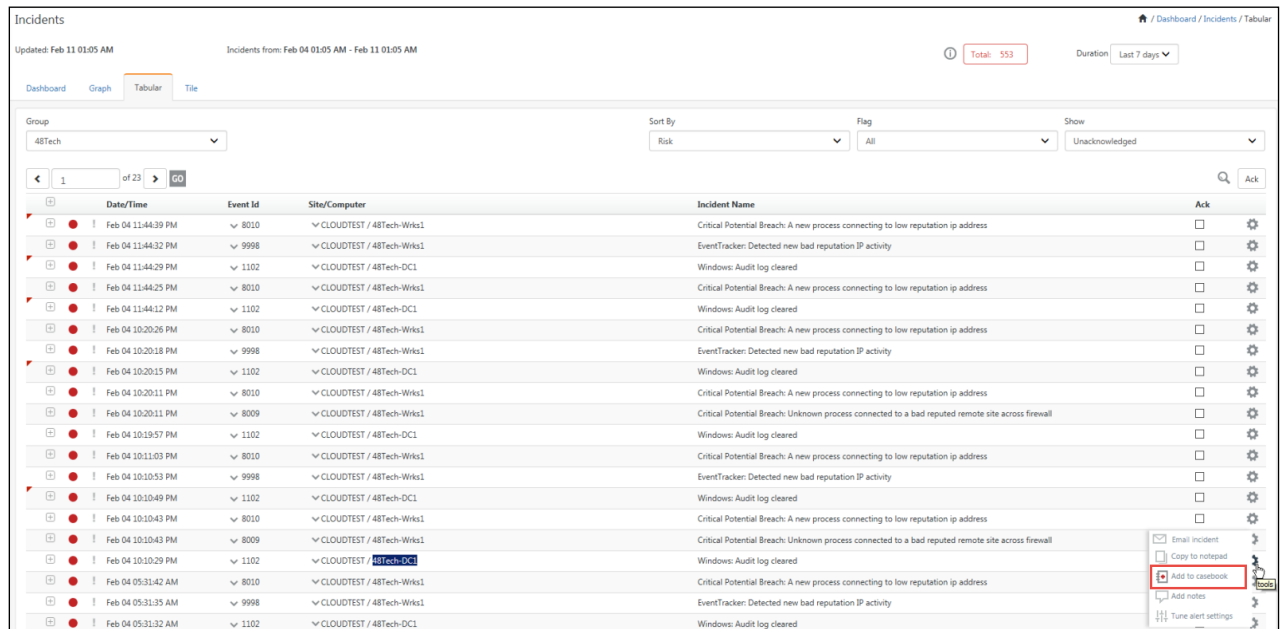
2. The mapping can be viewed in the result pane and click **Save**.



## 9 Case and Ticket Management

### 9.1 Creating a Ticket in the PSA Tool

1. To add a case from the incident page, click the gear icon and choose **“Add a Casebook”**.



2. At the bottom of the **Case** page, enable the option to **Create a ticket in PSA tool**.

**Note:**

If the groups/systems are not mapped to any of the PSA companies/configurations, then the option **Create a ticket in PSA tool** is not available when adding the case book.



**Case**

Case No: [ ] PSA Ticket Id: [ ] Criticality: Critical Title: Windows: Audit log cleared

Tag: [ ] Incident No: 201902074149 Added By: EventTrackerAdmin Added On: Feb 11 01:07:14 AM

Site/Computer: CLOUDTEST / 48Tech-DC1 Reason: [ ] Mail To: [ ]  
[SMTP server not configured. Required for sending email]

PSA Company: Big Design, Inc. PSA Configuration: BigDesign-WRK1

User Responsible: John Status in PSA tool: [ ] Description: 2/4/2019 10:10:29 PM: The audit log was cleared.  
 Subject: Security ID: 48Tech\John  
 Account Name: John  
 Domain Name: 48Tech

System Information Investigation References

Host Name: 48Tech-DC1 Operating System: Unknown IP Address: 192.168.4.78

Location: [ ] Component Installed: EventTracker 9.0 - Build 18

Create ticket in PSA tool Save Close

3. Once the option **Create ticket in PSA tool** is enabled and the casebook is saved, Case and the PSA Ticket ID is generated.

**Case**

Case No: 10012 PSA Ticket Id: 909 Criticality: Critical Title: Windows: Audit log cleared

Tag: [ ] Incident No: 201902074149 Added By: EventTrackerAdmin Added On: Feb 11 01:07:14 AM

Site/Computer: CLOUDTEST / 48Tech-DC1 Reason: testing Mail To: [ ]  
[SMTP server not configured. Required for sending email]

PSA Company: Big Design, Inc. PSA Configuration: BigDesign-WRK1

User Responsible: John Status in PSA tool: New (not responded) Description: 2/4/2019 10:10:29 PM: The audit log was cleared.  
 Subject: Security ID: 48Tech\John  
 Account Name: John  
 Domain Name: 48Tech

System Information **History** References

Added On	Added By	Edit
Feb 11 01:09:54 AM	EventTrackerAdmin	

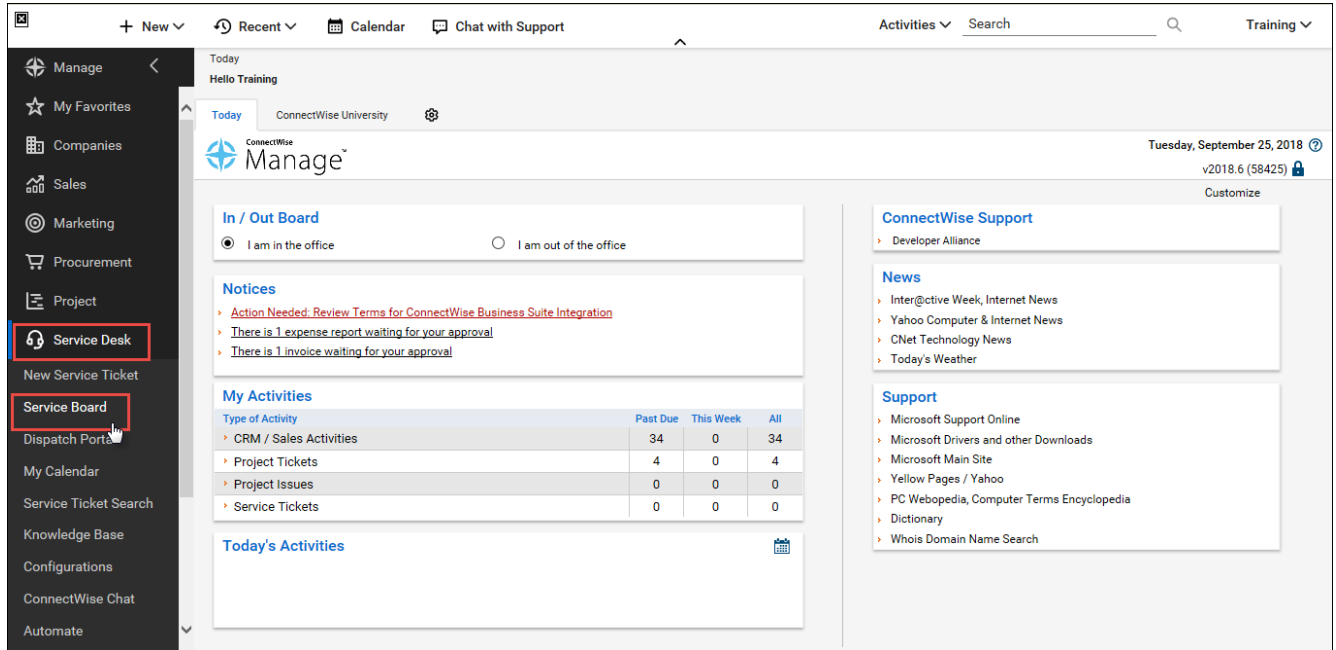
Attachments

Add investigation details

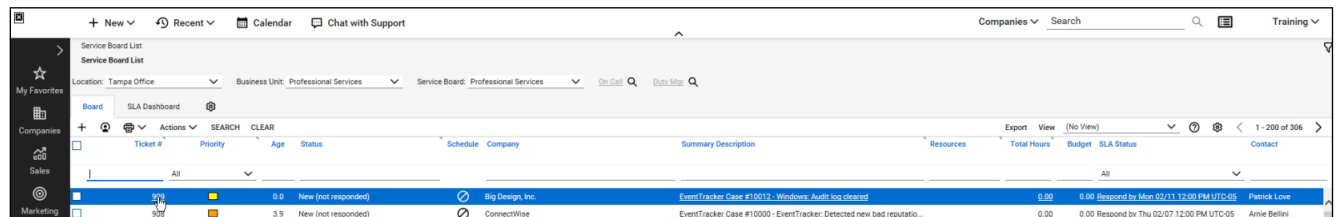
## 9.2 Viewing the Tickets Created in ConnectWise Manage

The cases created under Casebook in Netsurion Open XDR can be tracked and viewed in the ConnectWise Manage.

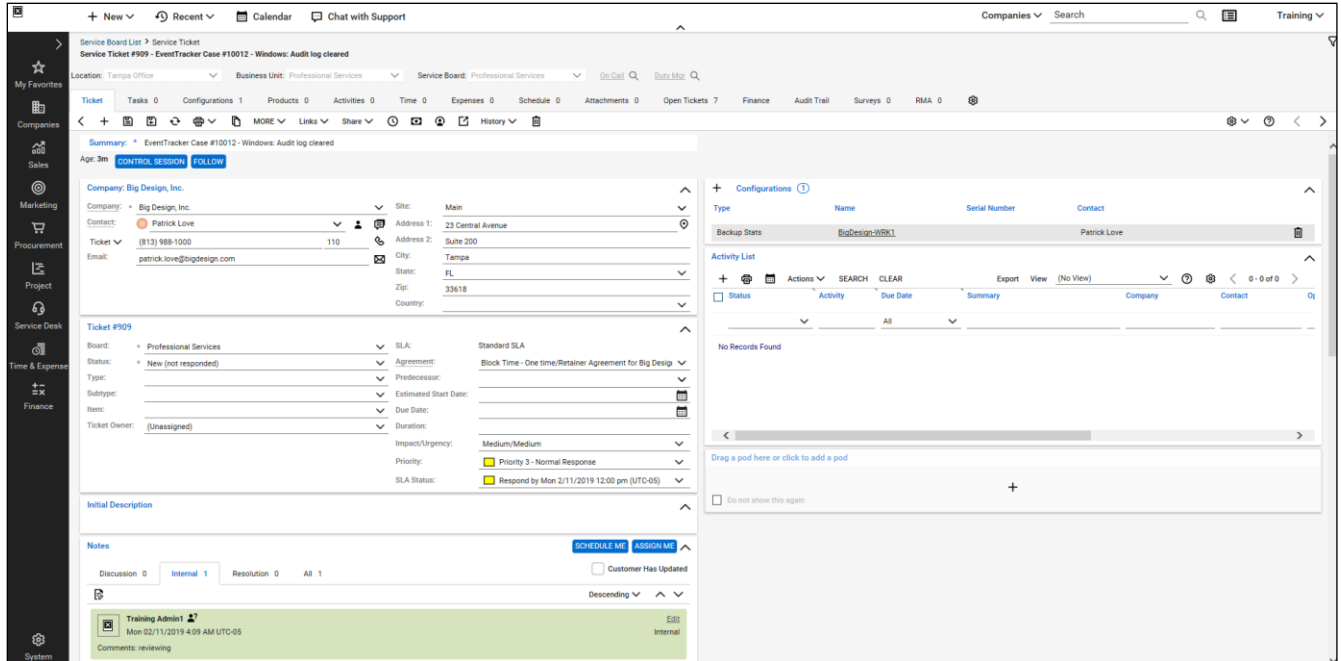
1. Login to ConnectWise Manage. Navigate to **Service Desk** and then to **Service Board** in the left pane.



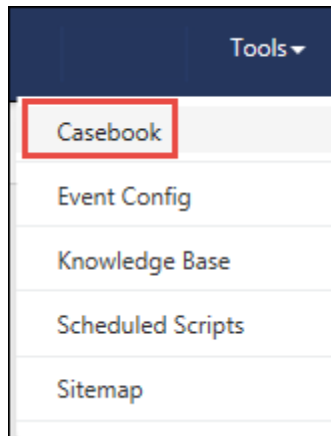
2. The created case in the Netsurion Open XDR's Casebook is viewed as a ticket in the ConnectWise Manage Service Board.



3. In our example, we are taking the Ticket ID 909. Click on the Ticket to view more details.



4. The above Ticket 909 was created as a case under Casebook in Netsurion Open XDR.
5. The case details are seen by logging into **Netsurion Open XDR > Tools > Casebook**.



6. The created cases are listed here.

Date	Id	PSA Ticket Id	Added By	Tag	Title	Criticality
Feb 11 01:09:53 AM	10012	909	EventTrackerAdmin		Windows: Audit log cleared	Critical
Feb 06 11:24:52 PM	10011		shaktimsp		Critical Potential Breach: A new process connecting to low reputation ip address	Critical
Feb 06 11:22:09 PM	10010	907	shaktimsp		Windows: Audit log cleared	Critical

## 9.3 Adding Comments for a Case

1. The **Comments** added for a **Case** can be viewed in **ConnectWise Manage** as notes in the **Notes** Pane and vice-versa.

Case No: 10012 | PSA Ticket Id: 909 | Criticality: Critical | Title: Windows: Audit log cleared

Tag: | Incident No: 201902074149 | Added By: EventTrackerAdmin | Added On: Feb 11 01:09:53 AM

Site/Computer: CLOUDTEST / 48Tech-DC1 | Reason: testing | Mail To: [SMTP server not configured. Required for sending email.]

PSA Company: Big Design, Inc. | PSA Configuration: BigDesign-WRK1

User Responsible: John | Status in PSA tool: New (not responded) | Description: 2/4/2019 10:10:29 PM: The audit log was cleared. Subject: Security ID: 48Tech\John, Account Name: John, Domain Name: 48Tech.

System Information | History | References

Added On	Added By	Edit
Feb 11 01:09:54 AM	EventTrackerAdmin	
Feb 11 01:17:03 AM	EventTrackerAdmin	

Comments: Final review is done

People Contacted:

Investigation procedure:

Investigative actions taken:

Impact determined:

Recommendations:

Attachments

[Add investigation details](#)

+ New | Recent | Calendar | Chat with Support | Companies | Search | Training

Service Board List > Service Ticket  
Service Ticket #909 - EventTracker Case #10012 - Windows: Audit log cleared

Location: Tampa Office | Business Unit: Professional Services | Service Board: Professional Services | On Call | Duty Mgr

Ticket | Tasks 0 | Configurations 1 | Products 0 | Activities 0 | Time 0 | Expenses 0 | Schedule 0 | Attachments 0 | Open Tickets 7 | Finance | Audit Trail | Surveys 0 | RMA 0

Summary: EventTracker Case #10012 - Windows: Audit log cleared

Age: 8m | [CONTROL SESSION](#) | [FOLLOW](#)

Company: Big Design, Inc.

Contact: Patrick Love | Site: Main | Address 1: 23 Central Avenue | Address 2: Suite 200 | City: Tampa | State: FL | Zip: 33618 | Country: | Email: patrick.love@bigdesign.com

Ticket #909

Board: Professional Services | SLA: Standard SLA | Agreement: Block Time - One time/Retainer Agreement for Big Design | Predecessor: | Estimated Start Date: | Due Date: | Duration: | Impact/Urgency: Medium/Medium | Priority: Priority 3 - Normal Response | SLA Status: Respond by Mon 2/11/2019 12:00 pm (UTC-05)

Initial Description

Notes

Discussion 0 | Internal 2 | Resolution 0 | All 2 | [SCHEDULE ME](#) | [ASSIGN ME](#) |  Customer Has Updated

Descending

Training Admin | Mon 02/11/2019 4:16 AM UTC-05 | Internal | Edit | Comments: Final review is done

Training Admin | Mon 02/11/2019 4:09 AM UTC-05 | Internal | Edit | Comments: reviewing

Configurations

Type	Name	Serial Number	Contact
Backup Status	BigDesign-WRK1		Patrick Love

Activity List

SEARCH | CLEAR | Export | View (No View) | 0-0 of 0

Status | Activity | Due Date | Summary | Company | Contact

No Records Found

Drag a pod here or click to add a pod

Do not show this again

2. The user can add notes or comments by clicking the **Notes** icon.

**Notes** SCHEDULE ME ASSIGN ME Customer Has Updated

Discussion 0 **Internal 3** Resolution 0 All 3

Descending

- Training Admin1**  
Mon 02/11/2019 4:25 AM UTC-05  
Comments: Attachment
- Training Admin1**  
Mon 02/11/2019 4:16 AM UTC-05  
Comments: Final review is done
- Training Admin1**  
Mon 02/11/2019 4:09 AM UTC-05  
Comments: reviewing

3. Alternatively, the ConnectWise user(s) can add notes from the **Time** tab or by clicking the icon

Service Ticket #909 - EventTracker Case #10012 - Windows: Audit log cleared

Location: Tampa Office Business Unit: Professional Services Service Board: Professional Services

Ticket **Time 1** Expenses 0 Schedule 0 Attachments 0 Open Tickets 7 Finance Audit Trail Surveys 0 RMA 0

Summary: \* EventTracker Case #10012 - Windows: Audit log cleared

Age: 12m CONTROL SESSION FOLLOW

## 9.4 Attachments in a Casebook

The attachment files added as references in the casebook can be viewed in ConnectWise Manage.

Case

Case No: 10012 PSA Ticket Id: 909 Criticality: Critical Title: Windows: Audit log cleared

Tag: Incident No: 201902074149 Added By: EventTrackerAdmin Added On: Feb 11 01:09:53 AM

Site/Computer: CLOUDTEST / 48Tech-DC1 Reason: testing Mail To: [SMTP server not configured. Required for sending email]

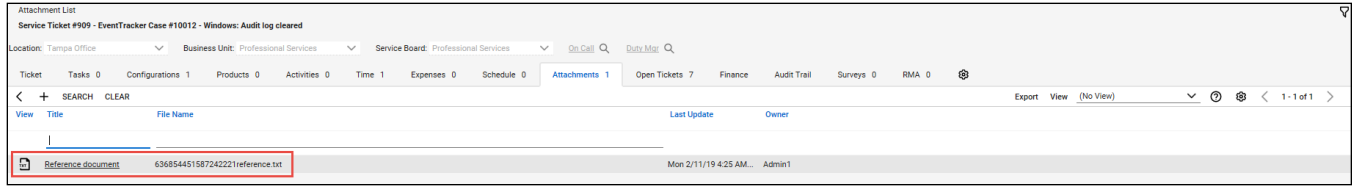
PSA Company: Big Design, Inc. PSA Configuration: BigDesign-WRK1

User Responsible: John Status in PSA tool: New (not responded) Description: 2/4/2019 10:10:29 PM:The audit log was cleared. Subject: Security ID: 48Tech\John Account Name: John Domain Name: 48Tech

Added On	Added By	Edit
Feb 11 01:09:54 AM	EventTrackerAdmin	
Feb 11 01:17:03 AM	EventTrackerAdmin	
Feb 11 01:25:58 AM	EventTrackerAdmin	

**Attachments**  
Reference document

In ConnectWise Manage, click the **Attachment** Tab to view the attachment for the respective ticket.



## 10 Use of Callbacks (Webhooks)

**Callbacks** in ConnectWise Manage is a mechanism, implemented to get the details updated for a ticket in Netsurion Open XDR. When a record is saved or updated for a ticket within ConnectWise Manage, it gets updated for the respective case in Netsurion Open XDR.

Type	Level	Description
Ticket	Ticket	Receive callbacks for specific tickets.

**Note:**

The Level column might change depending on the requirement.

## 11 Netsurion Open XDR DSI Assets for ConnectWise Manage

DSI assets for ConnectWise Manage is available in the installed path and can be configured into Netsurion Open XDR.

After applying the update, the below mentioned DSI assets will be present in the following path:

**ET install path/EventTracker/Knowledge Packs** folder.

### 11.1 Alerts

- ConnectWise Manage - New ticket created
- ConnectWise Manage - Ticket reopened
- ConnectWise Manage - Ticket modified
- ConnectWise Manage - Ticket closed
- ConnectWise Manage - Netsurion Open XDR system mapping failed
- ConnectWise Manage - Netsurion Open XDR group mapping failed

**Note:**

By default, alerts will be inactive once imported. Based on the requirement, you can activate the alert and email notification from Alert Management.

### 11.2 Reports

- ConnectWise Manage - New ticket created
- ConnectWise Manage - Ticket reopened
- ConnectWise Manage - Ticket modified
- ConnectWise Manage - Ticket closed
- ConnectWise Manage - All activity

### 11.3 Categories and Saved searches

- ConnectWise Manage - New ticket created
- ConnectWise Manage - Ticket reopened
- ConnectWise Manage - Ticket modified
- ConnectWise Manage - Ticket closed

## 11.4 Knowledge Objects

- ConnectWise Manage - New ticket created
- ConnectWise Manage - Ticket reopened
- ConnectWise Manage - Ticket modified
- ConnectWise Manage - Ticket closed
- ConnectWise Manage - Netsurion Open XDR system mapping failed
- ConnectWise Manage - Netsurion Open XDR group mapping failed

## 11.5 Dashboards

- ConnectWise Manage - New ticket created by username
- ConnectWise Manage - New ticket created by domain
- ConnectWise Manage - All activities
- ConnectWise Manage - Tickets reopened
- ConnectWise Manage - Tickets closed
- ConnectWise Manage - Tickets modified



## About Netsurion

Netsurion® delivers an adaptive managed security solution that integrates our Open XDR platform with your existing security investments and technology stack, easily scaling to fit your business needs. Netsurion's 24x7 SOC operates as your trusted cybersecurity partner, working closely with your IT team to strengthen your cybersecurity posture. Our solution delivers managed threat protection so you can confidently focus on your core business.

Headquartered in Ft. Lauderdale, FL with a global team of security analysts and engineers, Netsurion is a leader in Managed Detection & Response (MXDR). Learn more at [www.netsurion.com](http://www.netsurion.com).

## Contact Us

### Corporate Headquarters

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### Contact Numbers

Use the [form](#) to submit your technical support tickets. Or reach us directly at 1 (877) 333-1433

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Managed XDR Enterprise MSPs	<a href="mailto:SOC-MSP@Netsurion.com">SOC-MSP@Netsurion.com</a>
Managed XDR Essentials	<a href="mailto:Essentials@Netsurion.com">Essentials@Netsurion.com</a>
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<https://www.netsurion.com/support>