NETWORK DETECTIVE™

USER GUIDE

Microsoft Cloud Assessment

Instructions to Perform a Microsoft Cloud Assessment

11/7/2023 10:34 AM

Contents

Performing a Microsoft Cloud Assessment

Microsoft Cloud Assessment Overview

Network Detective's **Microsoft Cloud Assessment Module** combines 1) automated data collection with 2) a structured framework for documenting your assessment. To perform a Microsoft Cloud Assessment, you will:

- Download and install the required tools
- Create a site and set up a Microsoft Cloud Assessment project
- Collect Microsoft Cloud Assessment data using the Network Detective Checklist
- Generate Microsoft Cloud Assessment reports

What Does the Microsoft Cloud Assessment Cover?

This module helps you manage and assess risk across your entire Microsoft Cloud Assessment deployment. It assesses and documents several components, including:

- Microsoft 365 Cloud Services
  - Office 365
  - Teams
  - SharePoint
  - OneDrive (does not scan file content)
  - Outlook/Exchange (does not scan email content)
- Microsoft Azure Cloud Services
  - Entra ID Active Directory
  - Azure Infrastructure Data Collection (applications, virtual machines, services)

What Does the Microsoft Cloud Assessment Do?

As the computing world steadily moves more resources into the Cloud, it's getting increasingly difficult for MSPs and other IT professionals to manage assets and configurations that are no longer physically present . . . and that they don't have complete

control over. By periodically running a full assessment on each Microsoft Cloud environment, MSPs can provide themselves, and their clients, with essential reports that will help control the flow, privacy, and security of the organization's data.

Having all this information, organized and at your fingertips, is essential for:

- A new technician who's trying to get a handle on the Microsoft Cloud environment
- A Cloud administrator who is trying to hunt down a misconfiguration that's causing problems
- An MSP who needs to scope a proposal for a prospective new client
- Curbing the sprawl and potential HR headaches of Teams, SharePoint, and OneDrive

What You Will Need

In order to perform a Microsoft Cloud Assessment, you will need the following components:

Note: You can access these at https://www.rapidfiretools.com/nd.

Microsoft Cloud Assessment Component	Description
Network Detective	The Network Detective Application and Reporting Tool guides you through the assessment process from beginning to end. You use it to create sites and assessment projects, configure and use appliances, import scan data, and generate reports. The Network Detective Application is installed on your workstations/laptops; it is not intended to be installed on your client or prospect sites.
Admin Credentials for Microsoft 365 tenant to be assessed (OAUTH method)	You must have admin credentials for an admin role user who is a member of the Microsoft 365 tenant to be assessed. You will use these credentials to grant permission for Network Detective to connect to the Microsoft Graphs API. The following roles have been verified to work to create this connection: • **Privileged role admin** (Recommended) • **Cloud application admin** (Recommended) (Using one these roles will only grant permissions to the individual users who enter their credentials to perform the scan.) • **Global admin** (Using the Global admin role will grant scanning permissions to all non-admin users in the Microsoft 365 tenant who have access to the Site in Network Detective.) **If you attempt to sign in with another type of admin role than those listed above, you will be unable to grant the necessary permissions.** See Assign Admin Roles in the Microsoft 365 documentation for more details.

Follow these steps to perform a Microsoft Cloud Assessment:

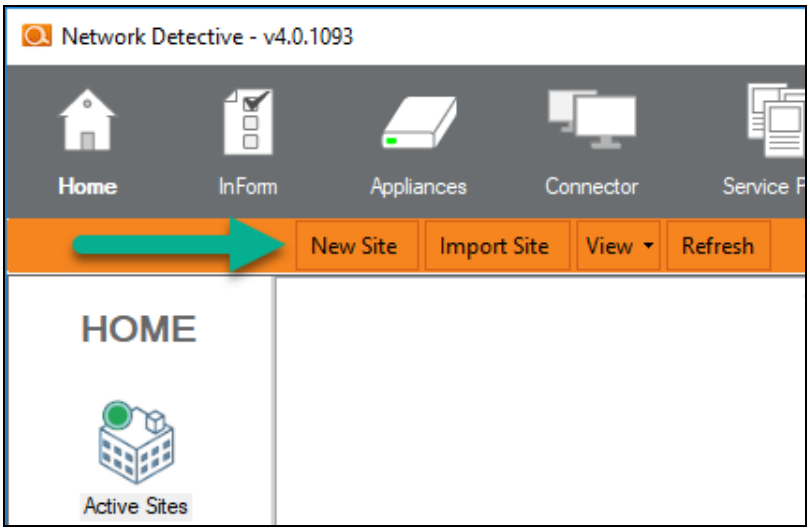
Step 1 — Download and Install the Network Detective Application

1. Visit https://www.rapidfiretools.com/nd. Download and install the Network Detective Application.
2. Open the app and log in using your credentials.

Step 2 — Create a New Site

To create a new site:

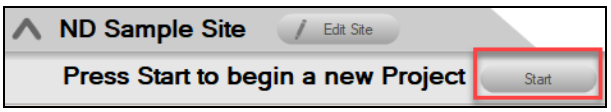
1. Click **New Site** to create a new Site for your assessment project.



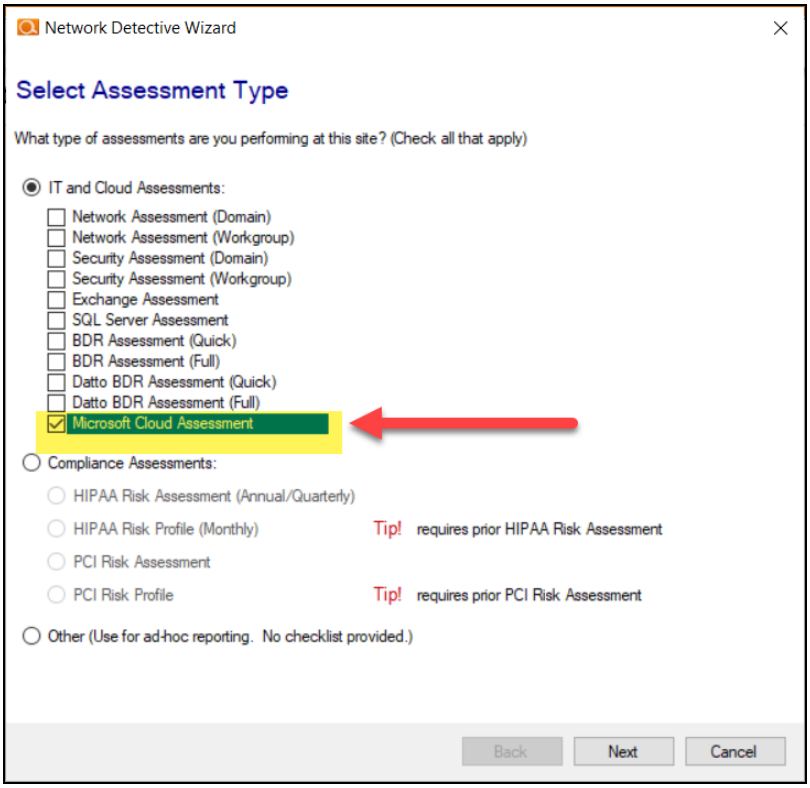
2. Enter a **Site Name** and click **OK**.

Step 3 — Start a Microsoft Cloud Assessment Project

1. From within the Site Window, click **Start** to begin the assessment.



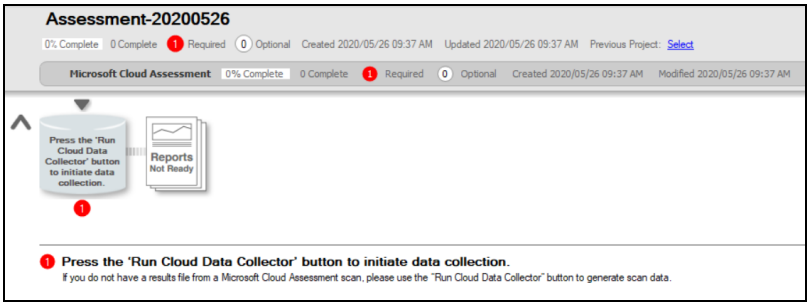
2. Next, select **IT and Cloud Assessments**, and then select Microsoft Cloud Assessment.



3. Then follow the prompts presented in the Network Detective Wizard to start the new Assessment.

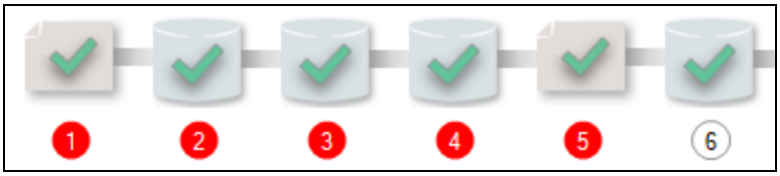
Use the Microsoft Cloud Assessment Checklist

Once you begin the Microsoft Cloud Assessment, a **Checklist** appears in the Assessment Window. The **Checklist** presents the **Required** 1 and **Optional** 1 steps that are to be performed during the assessment process. The **Checklist** will be updated with additional steps to be performed throughout the assessment process.



Complete the required **Checklist Items** in the exact numerical order presented. Use the **Refresh Checklist** feature to guide you through the assessment process at each step until completion.

When you complete a step, that item will be updated with a green check mark  in the checklist. Different assessment types have a different number of steps to complete.



You may also print a copy of the **Checklist** for reference purposes by using the **Printed Checklist** feature.

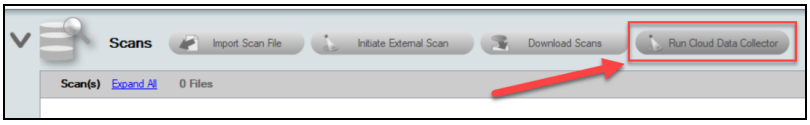
Step 4 — Run the Cloud Data Collector

See Modify Report Privacy Options in Microsoft 365 Admin Center to troubleshoot issues with how data appears in your reports.

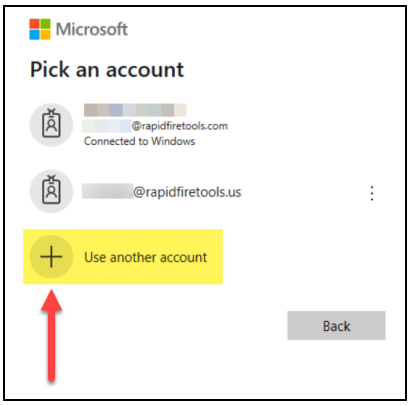
Perform Scan Using OAUTH Credentials

> **Note:** Before you can Run the Cloud Data Collector, you need admin credentials for the Microsoft 365 tenant to be assessed.

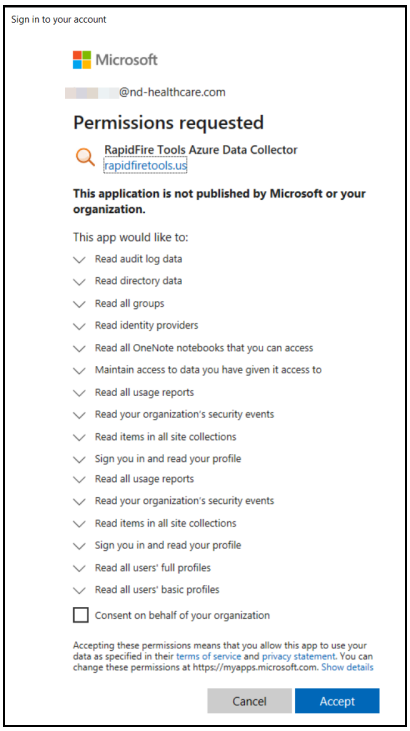
1. To start your assessment, click **Run Cloud Data Collector** under Scans.



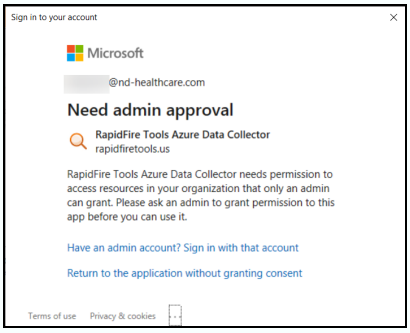
2. A Microsoft login window will appear. Enter admin credentials for the Microsoft Cloud environment to be assessed. To do this, click **Use Another Account**.



3. Consent to the permissions needed for Network Detective to scan the Microsoft Cloud environment. Check the box and click **Accept**.

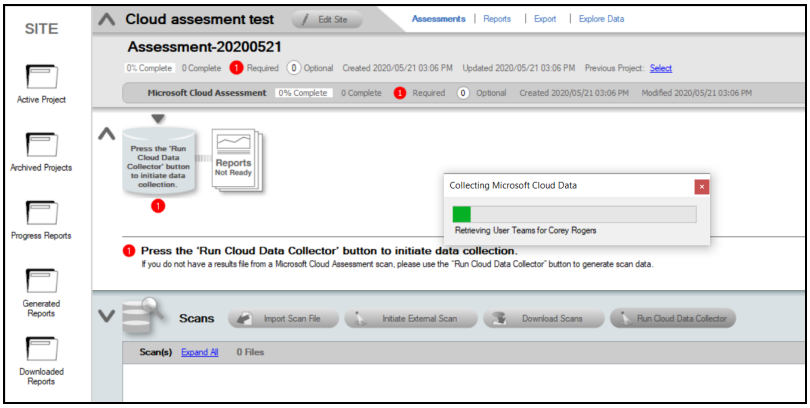


Note: If you attempt to sign in with an account that does not have the required admin access, you will be prompted to sign in with an admin account. See "Admin Credentials for Microsoft 365 tenant to be assessed (OAUTH method)" on page 6 for the specific admin roles.

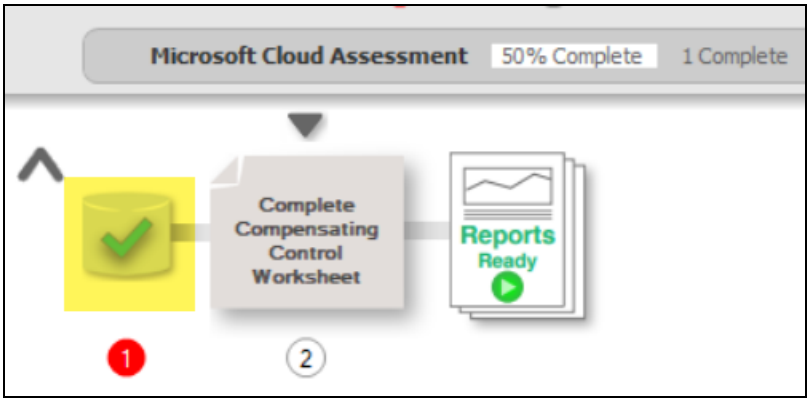


Scan in Progress

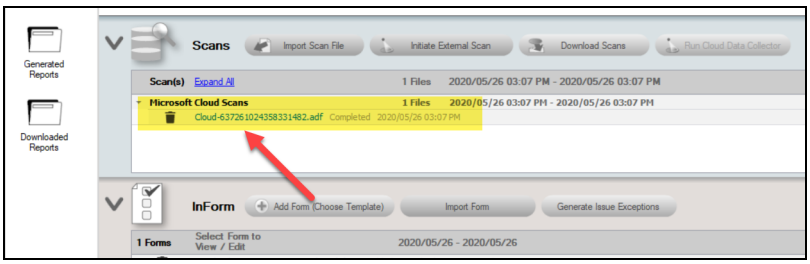
Once you initiate the scan using either method detailed above, the scan will begin and a progress window will appear. This process may take several minutes.



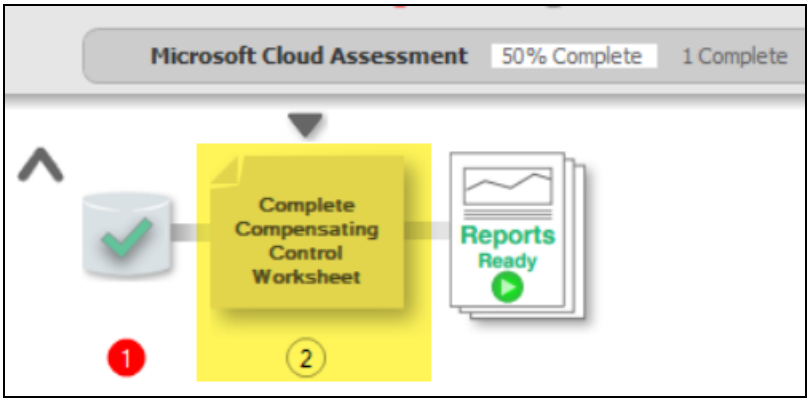
When the scan completes, the "Run Cloud Data Collector" step will be marked complete in the Checklist.



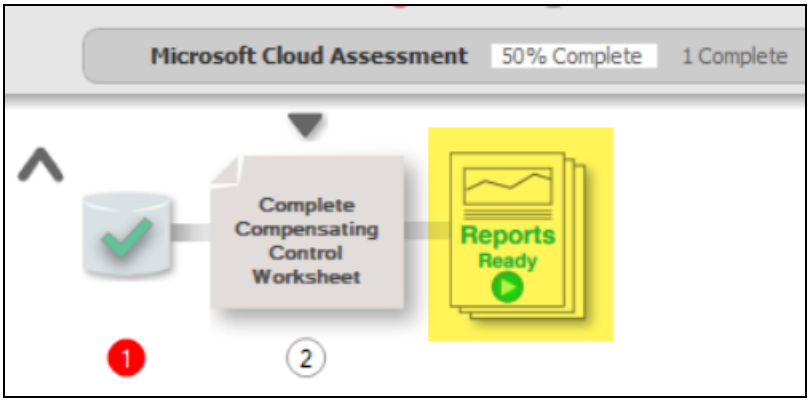
At the same time, the data file will appear in the Scans menu under Microsoft Cloud Scans.



The optional **Compensating Controls Worksheet** will then become available to complete.



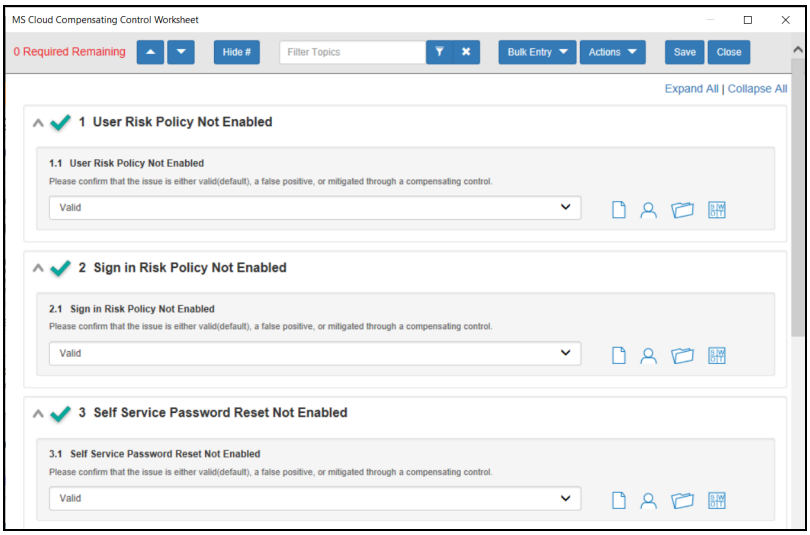
Finally, you can choose to generate reports based on the current scan data without choosing to enter information on Compensating Controls.



Step 5 — *(Optional)* Document Compensating Controls

Next, complete the optional **Compensating Controls Worksheet** (CCW). While not necessary to generate reports, the CCW details security exceptions that will be (or have been) implemented to mitigate risks in the cloud environment. Here you can document and explain why various discovered items are not true issues and possible false positives.

1. Double click on the **Compensating Controls Worksheet** from the assessment checklist.

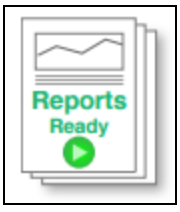


2. Ensure you save your changes to the form before you close it.
3. You may add notes, respondent names, SWOT details, responses, and file attachments.

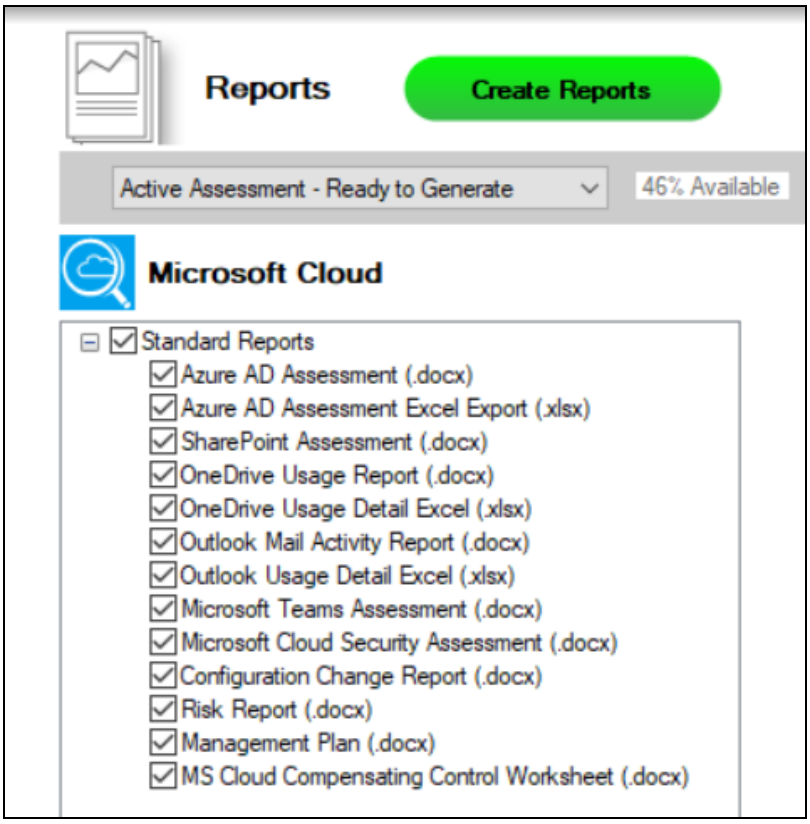
   When you complete all of the fields, this step will appear as complete in the check list.

Step 6 — Generate Reports

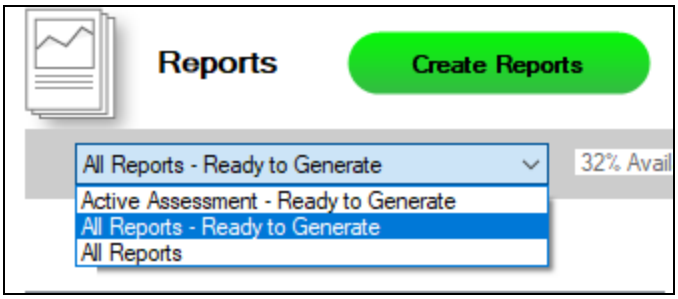
1. From your site, click the **Reports Ready** button at the end of the assessment checklist.



2. Select which of the Microsoft Cloud Assessment reports that you want to generate.

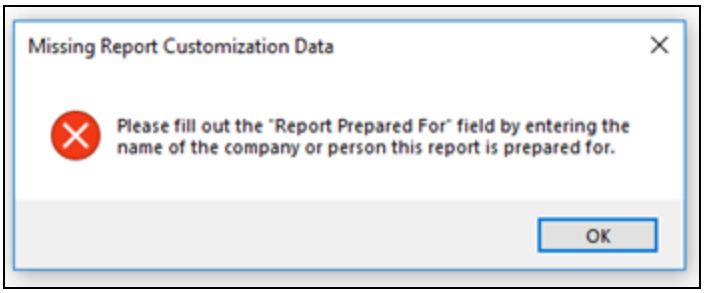


You can use the Reports drop-down menu to filter reports related to the active assessment project, reports that are ready to generate, or to browse all available reports.



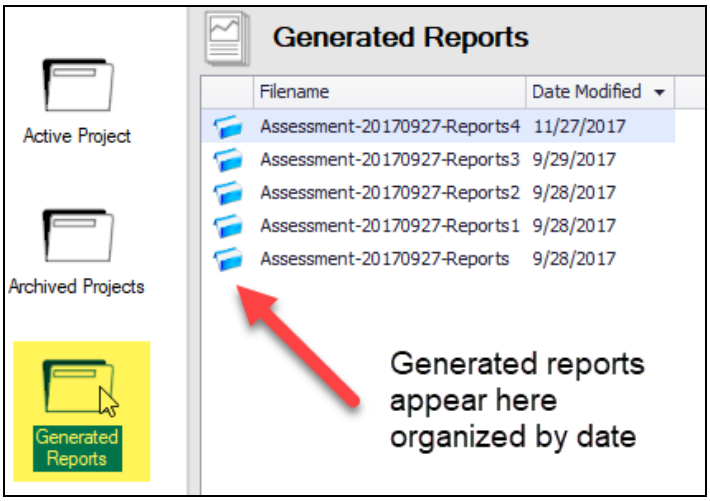
3. Click the **Create Reports** button and follow the prompts to generate the reports you selected.

    i. If you have not previously edited your Report Preferences, you will be prompted to do so before generating reports.



Tip: See the Network Detective User Guide for instructions on how to customize your reports with your company's branding.

Click **Generated Reports** from the left-hand Site menu to access previously generated reports. Double click a set of assessment reports to open the folder in Windows Explorer.



Microsoft Cloud Assessment Reports

The Microsoft Cloud Assessment allows you to generate the following reports and supporting documents:

Report Name	Description
Azure AD Detail Report	The Azure AD Detail Report goes through the entire Azure Active Directory environment and documents all organizations, domains, and support services that are turned on for the AD environment. Every detail is presented in line-item fashion in an editable report document, including: installed special applications, web URLs to those apps, organizational contacts, distribution lists, proxy addresses, Microsoft service plans and SKUs being used, groups, users, permissions, devices, and more. The report is organized by section with a table of contents to help you locate the specific findings of interest, and problem areas are conveniently highlighted in red, making it easy to spot individual problems to be rectified.
Cloud Management Plan	The Cloud Management Plan takes issues identified in the Risk Report, organizes them by severity, and includes specific recommendations on how to remediate them. The report's information is pulled directly from the Microsoft controls from multiple Cloud components, including SharePoint, OneDrive, Teams, Azure AD itself. It also identifies other types of issues related to misconfigurations and operations.
Cloud Risk Report	The Cloud Risk Report, like the Risk Reports in all of our other Network Detective modules, spans all of the Microsoft Cloud components. It includes an overall Risk Score, an overall Issues Score, as well as a summary list of issues discovered. The issues come from both the Microsoft controls as well as other best practices. It identifies specific risks that are due to misconfigurations as well as risks created from turning on or off specific running components.
Compensating Control Worksheet	The report is used present the details associated with security exceptions and how Compensating Controls will be or have been implemented to mitigate risks in the cloud environment. Here you can explain document and explain why various discovered items are not true issues and possible false positives. The benefit of this feature is that it adds back in the human element into the assessment and allows for explanation of special circumstances and specific environment

Report Name	Description
	requirements. The Compensating Controls Worksheet does not alleviate the need for safe guards but allows for description of alternative means of mitigating the identified security risk.
Microsoft Cloud Configuration Change Report	The Microsoft Cloud Configuration Change Report is a very detailed technical report that identifies entity and configuration changes. The changes are grouped by properties, showing the old values vs. the new values, and then the changes are grouped together into bands called “Change Sets.” This report gives you the ability to look at a group of changes together, as well as see how all the properties have changed for that particular time period. This is useful for change management and for capturing and documenting unwanted changes in the event you need to roll back those changes in the user interface.
Microsoft Cloud Security Assessment	The Microsoft Cloud Security Assessment report brings together all of the security aspects of Microsoft Cloud under one umbrella. It not only includes your own Microsoft Control Score and Secure Score from Microsoft; it also shows your trending against the average score of your peers.
Microsoft Teams Assessment Report	The Microsoft Teams Assessment Report provides detail about each team in the system, including who the owners are, what channels they have, and what kind of user identity audits have been conducted on the channels. There are individual entries that can be used for audits of the member settings, the guest settings, the message settings, the fun settings, the tab settings. This information goes beyond the Microsoft security score controls and includes other types of misconfigurations that might cause security problems, such as having guest members that are able to remove and delete channels.
OneDrive Assessment Report	The OneDrive Assessment Report provides a high-level summary report of all OneDrive usage. This is critical to know, since it includes every user the system has, all the Teams, and all the sites created by the client. This overview report gives you a solid handle on how the OneDrive platform is growing, and looks for spikes in that growth that need to be managed. It also looks for spikes in activity that may need to be investigated. The report provides trends over of 30-, 60-, and 90-day increments to give you a solid indicator of storage and bandwidth utilization.
Outlook Mail Activity Report	The Outlook Mail Activity Report is the perfect complement to the Network Detective Exchange Assessment module, which provides

Report Name	Description
	deep dive information about Office 365 usage. The Outlook Mail Activity Report provides a high-level summary of what emails are being sent and received by your top 10 active senders and active receivers for the reporting period. This report is meant to be run month-over-month to identify the power users who may need more capacity, and which mailboxes are not being read at all and likely represent recently inactive users that need to be cleaned up.
SharePoint Assessment Report	The SharePoint Assessment Report is a detailed assessment that shows the total number of sites started under management, how many active SharePoint sites there are, what storage requirements there are, and includes daily trends in the number of sites and storage usage. It then takes the site collections and breaks down all the individual sites so you can understand what is being published in each, how they are organized, and even what groups they contain. Among other things, the report helps understand growth trends and better predicts backup needs.

Appendices

Refer to the appendices listed below for the supplementary information referenced in this user guide:

Pre-Scan Network Configuration Checklist

RapidFire Tools products can gather a great deal of information from the target network with little advance preparation – and with very little footprint! However, if you are having trouble with scans, or you have the ability to configure the target network in advance, we recommend the settings below.

These checklists detail the recommended network configurations for both Windows **Domain** and **Workgroup** environments.

> **Note:** You must have the .NET 4.6.2 framework installed on machines in order to use all data collector and server/appliance tools.

Checklist for Domain Environments

Share this checklist with your IT Administrator and ask them to configure your network's Domain Controller as follows:

Complete	Domain Configuration
	GPO Configuration for Windows Firewall (Inbound Rules)
☐	Allow *Windows Management Instrumentation (WMI)* service to operate through Windows Firewall This includes the following rules: • Windows Management Instrumentation (ASync-In) • Windows Management Instrumentation (WMI-In) • Windows Management Instrumentation (DCOM-In)
☐	Allow *File and printer sharing* to operate through Windows Firewall This includes the following rules: • File and Printer Sharing (NB-Name-In) • File and Printer Sharing (SMB-In) • File and Printer Sharing (NB-Session-In)
☐	Enable *Remote Registry* "read only" access on computers targeted for scanning.

Complete	Domain Configuration
	Note: Remote Registry access should be restricted for use by the user access account credentials to be used during network and local computer scan.
☐	Enable the *Internet Control Message Protocol (ICMP)* to allow authorized ICMP echo request messages and ICMP echo reply messages to be sent and received by Windows computers and network devices. Windows firewall rules on Windows computers may need to be created/enabled to allow a computer: • operating a Kaseya-RapidFire Tools product network data collector to issue ICMP echo request messages to be sent to Windows computers and network devices • to send ICMP echo reply messages in response to an ICMP echo request **Note:** ICMP requests are used to detect active Windows computers and network devices to scan.
	GPO Configuration for Windows Services
☐	*Windows Management Instrumentation (WMI)* • Startup Type: Automatic
☐	*Windows Update Service* • Startup Type: Automatic
☐	*Remote Registry* • Startup Type: Automatic
☐	*Remote Procedure Call* • Startup Type: Automatic
	Network Shares
☐	• *Admin$* must be present and accessible using supplied credentials (usually a local admin or user in the local Computer's Administrative Security group)

Complete	Domain Configuration
	3rd Party Firewalls
☐	• Ensure that 3rd party Firewalls are configured similarly to Windows Firewall rules described within this checklist. **Note:** This is a requirment for both Active Directory and Workgroup Networks.

Checklist for Workgroup Environments

Before you perform a workgroup assessment, run the following PowerShell commands on the target network and the machine that will perform the scan. These three configurations should help you avoid most issues in a workgroup environment. Each command is followed by an explanation and link to Microsoft documentation.

1. `reg add HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\system /v LocalAccountTokenFilterPolicy /t REG_DWORD /d 1 /f`

   By default, UAC only allows remote administration tasks to be performed by the Built-in Administrator account. To work around this, this command sets the LocalAccountTokenFilterPolicy registry key to 1. This allows any local admin to perform remote administrative tasks (i.e. access to system shares C$, Admin$, etc.).

   https://support.microsoft.com/en-us/help/951016/description-of-user-account-control-and-remote-restrictions-in-windows

2. `netsh advfirewall firewall set rule group="windows management instrumentation (wmi)" new enable=yes`

   This command creates an Inbound firewall rule to allow access to the WMI service and namespaces.

   https://docs.microsoft.com/en-us/windows/win32/wmisdk/connecting-to-wmi-remotely-starting-with-vista

3. `netsh advfirewall firewall set rule group="File and Printer Sharing" new enable=Yes`

This command creates an Inbound firewall rule which enables File and Printer Sharing on the machine. File and printer sharing is required in order to access the Admin$ share on remote machines.

https://answers.microsoft.com/en-us/windows/forum/all/turning-on-file-and-printer-sharing-windows-10/bb3066eb-f589-4021-8f71-617e70854354

You can also share this checklist with your IT Administrator and ask them to configure each computer in your workgroup as follows:

Complete?	Workgroup Configuration
	Network Settings
☐	• *Admin$* must be present on the computers you wish to scan, and be accessible with the login credentials you provide for the scan
☐	• *File and printer sharing* must be enabled on the computers you wish to scan
☐	• *Ensure the Windows Services below are running and allowed to communicate through Windows Firewall*: • Windows Management Instrumentation (WMI) • Windows Update Service • Remote Registry • Remote Desktop • Remote Procedure Call
☐	• Workgroup computer administrator user account credentials. **Note:** Before configuring scan settings for workgroups, prepare a list of the workgroup computer(s) adminstrator user account credentials for entry into the scan settings wizard.
☐	Enable the *Internet Control Message Protocol (ICMP)* to allow authorized ICMP echo request messages and ICMP echo reply messages to be sent and received by Windows computers and network devices. Windows firewall rules on Windows computers may need to be created/enabled to allow a computer:

Complete?	Workgroup Configuration
	• operating a Kaseya-RapidFire Tools product network data collector to issue ICMP echo request messages to be sent to Windows computers and network devices • to send ICMP echo reply messages in response to an ICMP echo request **Note:** ICMP requests are used to detect active Windows computers and network devices to scan.

Completing Worksheets and Surveys

Throughout the assessment process, assessment data is gathered though the use of automated scans and by documenting information in a series of surveys and worksheets.

These surveys and worksheets are dynamically generated when the assessment is initially started and when data is collected throughout the assessment process.

Assessment response data is collected through:

- use of automated scans
- importing responses from Word documents
- typing the information directly into surveys and worksheets forms

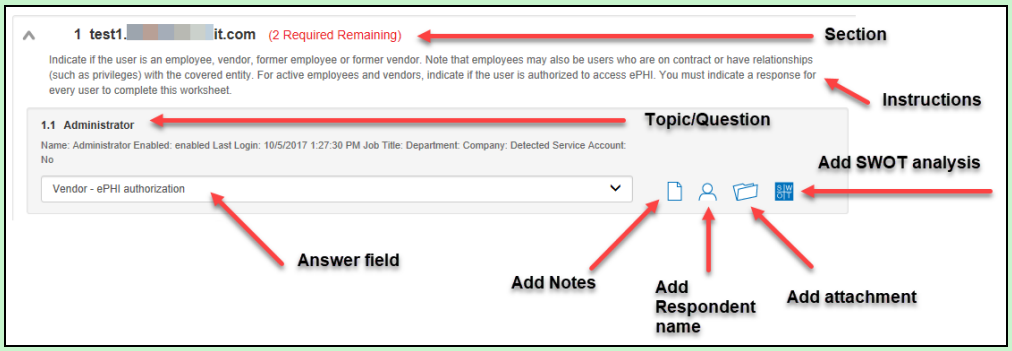
Entering Assessment Responses into Surveys and Worksheets

Throughout the assessment process a number of **Surveys** and **Worksheets** will be generated and require completion.

EXAMPLE:

To complete an InForm worksheet (or survey or questionnaire), follow these steps:

i. Review the *Topic* (i.e. the specific field or question within the form).



ii. Review the *Instructions*. The instructions appear immediately below the topic label. Instructions provide guidance and are not included in the reports.

iii. Enter the *Response*. There are three types of responses:

Response Type	Description	Example Use
Text Response	Free-form text response	"Describe the condition of the data center."
Multiple Choice	Multiple fixed responses	"Does the firewall have IPS?" (Yes/No)
Checklist Item	An item that is marked off if completed	"Check the security of the door locks."

> **Note:** With few exceptions, you must respond to each form entry to complete the all of the surveys within the Microsoft Cloud Assessment process.

iv. (Optional) Enter any *Notes* relevant to the topic's response.

v. (Optional) Enter the name of *Respondent* (i.e. the person who provided you with the information, if applicable).

vi. (Optional) Add any relevant *Attachments*. See "Add Image Attachments to Surveys and Worksheets" below for more details.

> **Note:** Only image attachments (.png, .jpg) are supported at this time.

vii. (Optional) Add a *SWOT Analysis*, examining Strengths, Opportunities, Weaknesses, and Threats. See "Add SWOT Analysis to Surveys and Worksheets" on the facing page for more details.

viii. Save your answers periodically and **Save** and **Close** when you are done.

Add Image Attachments to Surveys and Worksheets

You can add images to worksheets and surveys. You might include pictures of key personnel or diagrams that explain certain security exceptions.

Attachments can be added to each item or question listed in a worksheet. To do this:

1. Open the InForm in your assessment in Network Detective.
2. Underneath an InForm item, click on the folder icon.

3. Click **Add**.
4. Select the attachment from your computer and click **Open**.
5. Continue adding attachments until you are finished.

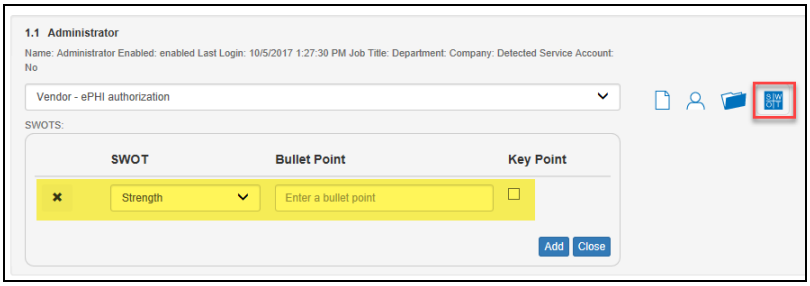
> **Note:** Once you complete your assessment and generate reports, your attached images will appear alongside the form item in the published report and/or supporting document.

Add SWOT Analysis to Surveys and Worksheets

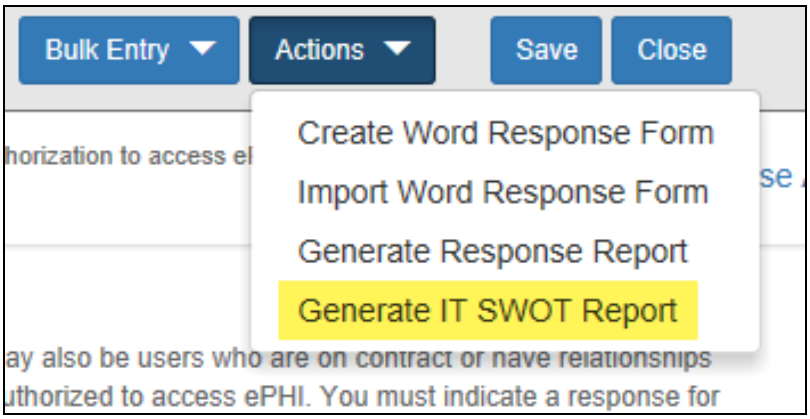
The IT SWOT analysis is a structured method used to evaluate the Strengths, Weaknesses, Opportunities, and Threats affecting an IT network. The analysis involves identifying internal and external issues that are favorable and unfavorable to increasing the overall network health and security of the environment.

To add SWOT to your inform items:

1. Open the InForm in your active assessment in Network Detective.
2. Underneath an InForm item, click on the SWOT icon.



3. Fill in the required fields for each SWOT entry:
   - **Bullet Point**: Enter a short description of the issue here.
   - **Key Point**: Check this to make the entry appear in the SWOT table in the report. Otherwise, it will appear with the rest of the issues in the SWOT list in the report.
4. When you have finished entering all SWOT items for an InForm, click **Actions** and select **Generate IT SWOT Report**.

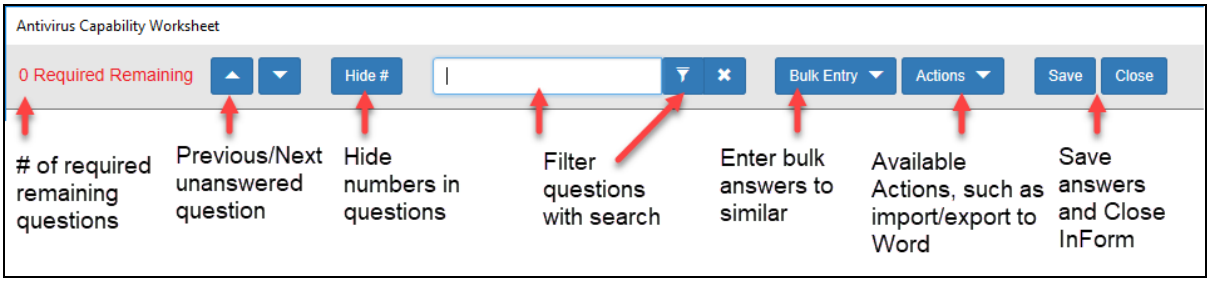


Note: A folder will open with your generated IT SWOT Report. You must generate this report separately for each InForm in your assessment.

Time Savings Tip to Reduce Survey and Worksheet Data Input Time

Use the InForm Worksheet Tool Bar

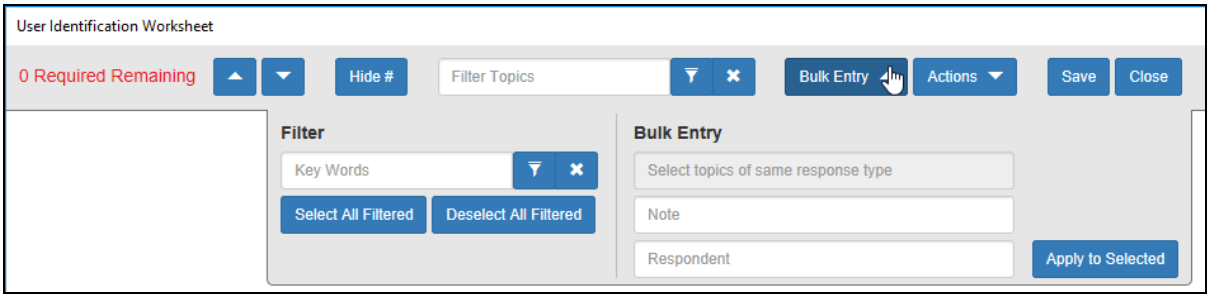
Use the InForm tool bar to save time when completing worksheets.



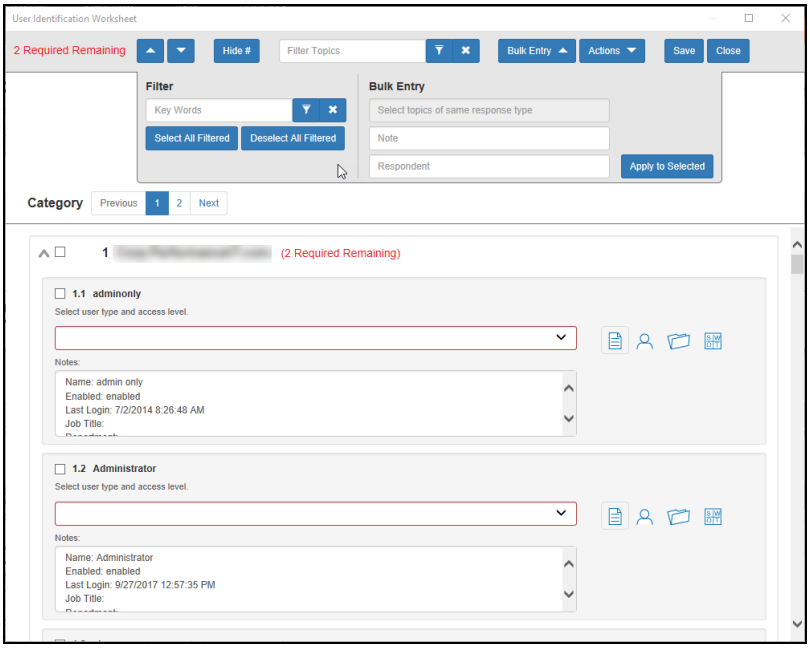
Bulk Entry for InForm Worksheets

InForm allows you to enter bulk responses for worksheet questions. Note that you can only enter bulk responses for questions that require the same types of responses. To use the bulk entry feature:

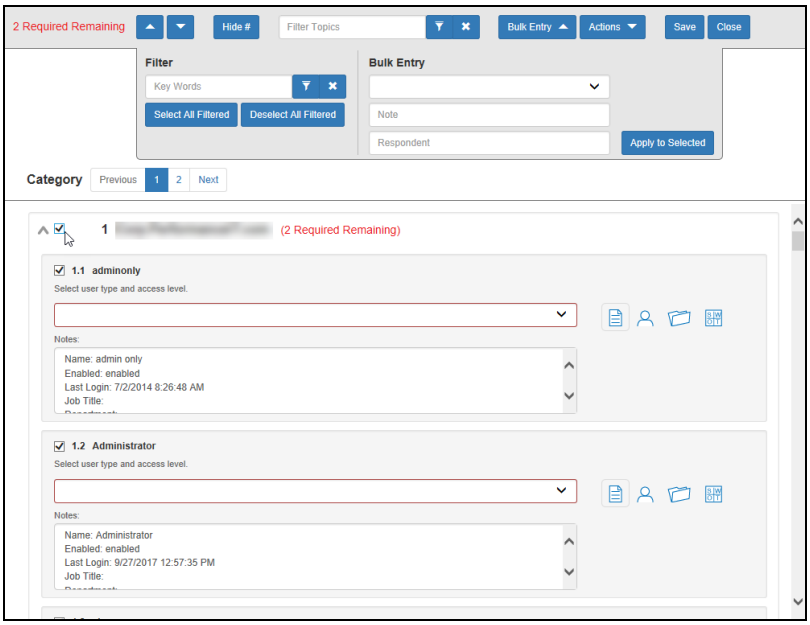
1. Click **Bulk Entry** from the Inform tool bar.



Check boxes will appear next to the response topics.

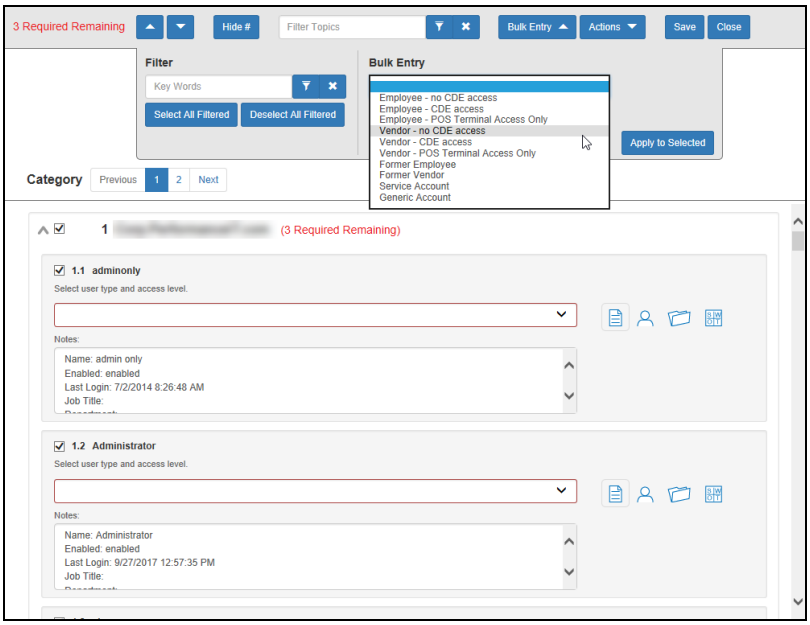


2. Select the check boxes for the topics for which you wish to enter bulk responses.

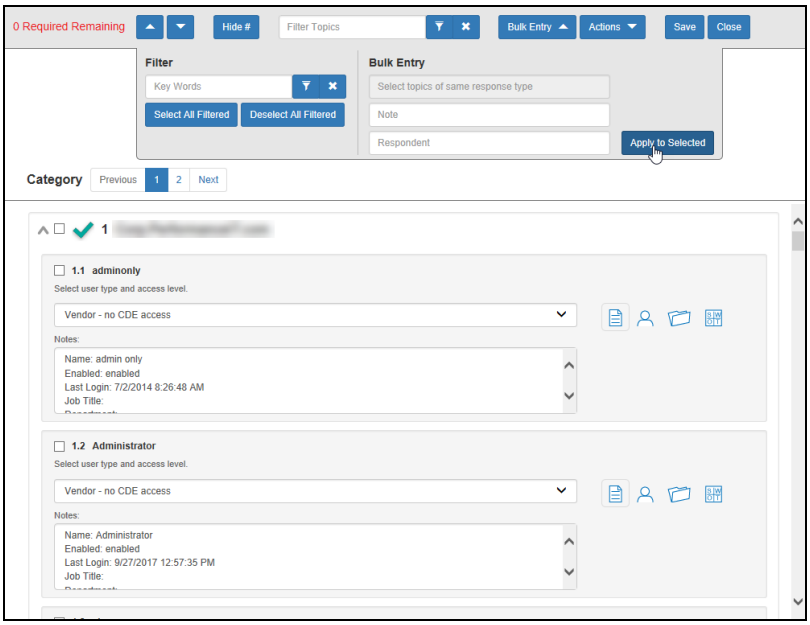


Note: You can select individual topics, or you can click the check box next to the section heading to select all topics within the section. You can also **Filter** topics using terms like "Admin." Note that each topic within the section must require the same types of responses in order to enter bulk responses.

3. Select the response from the Bulk Entry menu. You can likewise enter any relevant notes or the name of a respondent.



4. Then click **Apply to Selected**.



Your chosen response will be entered into the selected topics.

Create Word Response Form

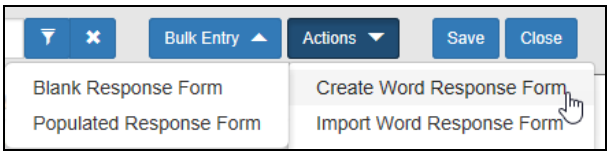
You can export InForm worksheets in your assessment project to Word. This allows you or others to complete worksheets without using Network Detective. For example, you can create a Word response form and send it to a client at a site. The client can then help you gather the required information and enter it in the response form.

Important: In order to import your data, you must enter your responses in the fields contained in the Word document. See "Important Note on Working with Word Response Forms" on the next page for detailed instructions.

To create a Word response Form:

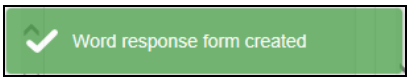
1. From the Active Assessment screen in Network Detective, open the worksheet that you want to export to Word.
2. From the InForm tool bar, click **Actions**.
    a. Click **Blank Response Form** to generate a Word document with blank fields ready for data entry.
    b. Click **Populated Response Form** to generate a Word document with the

responses already entered using InForm.



3. Select the location to save the file. Click **Save**.

   A confirmation message will appear.



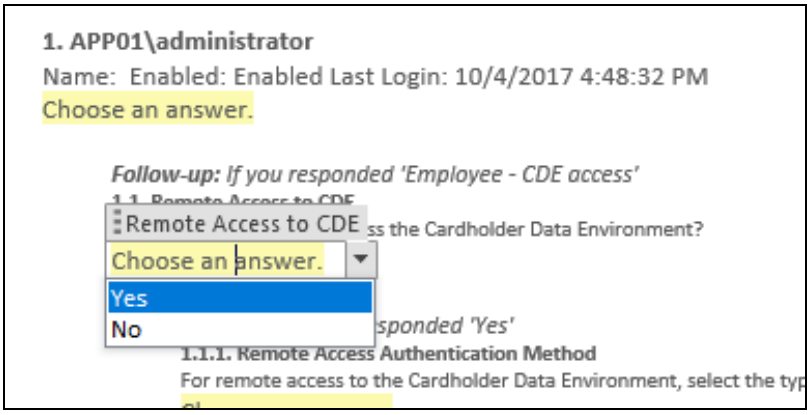
Important Note on Working with Word Response Forms

When you export a Word response form from your assessment, keep in mind the following important tips:

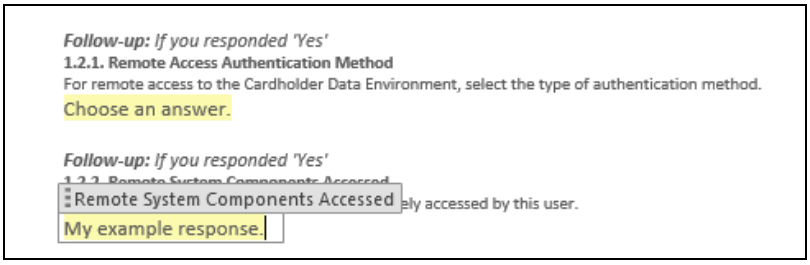
- **DO NOT DELETE** the field controls embedded in the response form! The response fields appear in the images below for your reference:

  Important: If you delete these fields, your data cannot be imported into the assessment!

  Multiple choice response field



  Text response field



- You must use the Word fields to enter your responses. Any content you enter not included in these fields will not be imported into your assessment.

Import Word Response Form

You can import a Word response form into your assessment using InForm. This allows you to collaborate with others to gather information and complete worksheets.

EXAMPLE:

Step 1: Create/export a Word response form for one of the worksheets in your assessment.

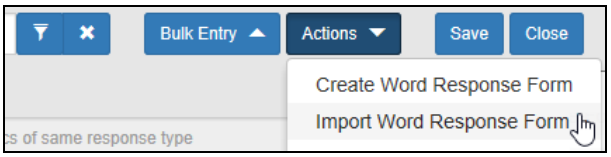
Step 2: Send it to a client to enter additional information about the site using Word.

Step 3: The client can then send you the worksheet as an email attachment.

Step 4: Import the Word document back into your assessment with the client's responses and make any final changes to the worksheet.

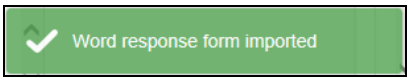
To import a Word response form:

1. From the Active Assessment screen in Network Detective, open the worksheet that you want to export to Word.
2. From the InForm tool bar, click **Actions**.
3. Click **Import Word Response Form**.



4. Select the file to import. Click **Open**.

A confirmation message will appear. The InForm worksheet fields will be updated with the imported responses.



Integrate Network Detective with a PSA System

With Network Detective, you can export important information uncovered during your assessment into your preferred Professional Services Automation (PSA) system. This includes technical information on computer assets discovered on the network, contact information for network users, and issues for remediation. This topic covers how to integrate Network Detective with your chosen PSA System.

Step 1 — Gather Credentials and Set Up your PSA System

Before you begin, you will need:

- Valid Login Credentials for Network Detective
- A Network Detective "Site" for which you wish to export items or create tickets in your PSA
- Valid Login Credentials for your PSA system account (if you wish to integrate Network Detective with multiple PSA accounts, gather credentials for each PSA account)
- Other prerequisites specific to your chosen PSA system (refer to the table below)

PSA System	PSA Prerequisites
Autotask®	**Note:** To set up a connection between the Network Detective application and the Autotask system, you will need to create an API User in Autotask. See "Set Up Autotask Integration" on page 45. • Autotask API Username • Autotask API Password
REST ConnectWise™	• ConnectWise REST Public Key • ConnectWise REST Private Key • ConnectWise Company ID • ConnectWise PSA URL

PSA System	PSA Prerequisites
	Note: You must configure ConnectWise correctly before you can integrate with Network Detective. See "Set Up ConnectWise REST Integration" on page 50 for detailed instructions.
	• ConnectWise Username • ConnectWise Password • ConnectWise Company ID • ConnectWise PSA URL **Note:** You must configure ConnectWise correctly before you can integrate with Network Detective. See "Set Up ConnectWise SOAP Integration" on page 59 for detailed instructions.
	• Tigerpaw Username • Tigerpaw Password • Tigerpaw API URL
	• Kaseya Username • Kaseya Password **Note:** The Kaseya User must be in the Kaseya Administrator Role. See for "Set Up Kaseya BMS Integration" on page 61 detailed instructions. • Kaseya Tenant (i.e. company name) • Kaseya API URL, example: "https://bms.kaseya.com" (you

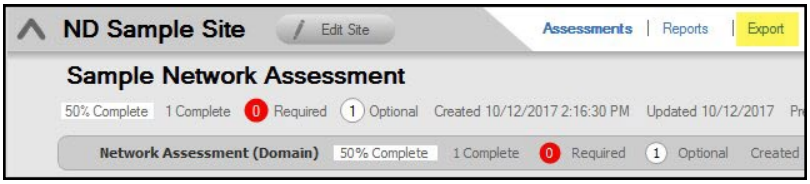
PSA System	PSA Prerequisites
	should receive the exact URL in an email from Kaseya)

Step 2 — Create a Connection Between Network Detective and Target PSA

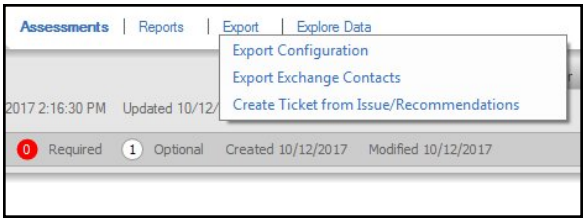
1. If you have not already done so, visit https://www.rapidfiretools.com/nd-downloads to **download and install Network Detective**.
2. **Start Network Detective** and log in with your credentials.
3. Open the **Site** for which you wish to create tickets in the target PSA.

   > **Note:** You must have completed your assessment project and must have reports ready to generate in order to create tickets.

4. Within the Assessment window, click **Export**.

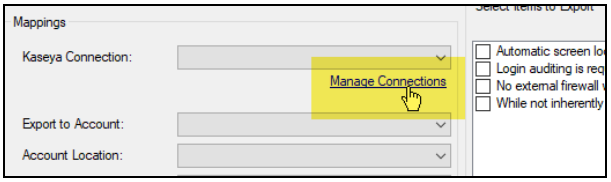


5. Choose an export option from the drop-down menu.

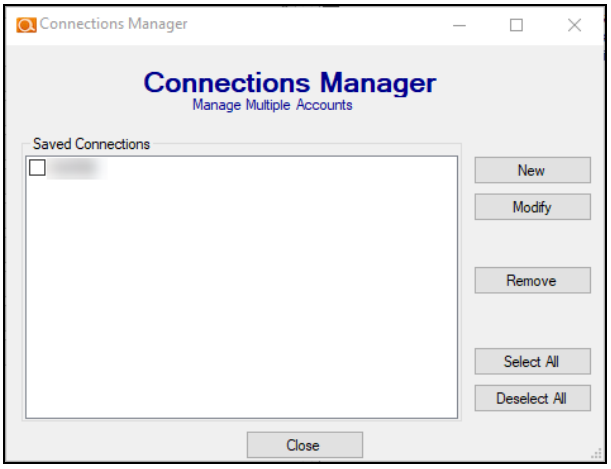


6. **Select your Target** Ticketing/PSA system from the list of supported options.

7. Click **Manage Connections**.

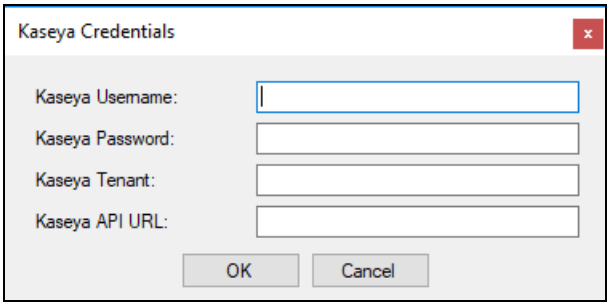


The Connections Manager window will be displayed.



8. Select the **New** button in the Connections Manager window to create a new PSA connection.

   The PSA Credentials window will be displayed



9. Enter the credentials for chosen PSA.

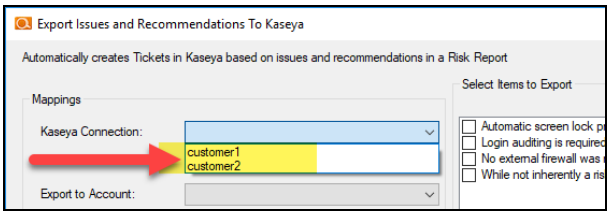
   Important: To generate login credentials for ConnectWise REST, see "Set Up ConnectWise REST Integration" on page 50. To generate login credentials for ConnectWise SOAP, see "Set Up ConnectWise SOAP Integration" on page 59.

10. Click **OK**.

    The new Connection will be listed in the Saved Connections list in the Connections Manager window.

    Tip: If you wish to export items to multiple, separate PSA accounts, repeat this process and add Connections for each account.

11. Click **Close** to dismiss the Connection Manager.
12. From the Export screen, verify the connection by selecting it from the drop-down menu.



> **Note:** If the connection is successful, some of the Mappings fields should automatically populate with values from the PSA system.

13. Proceed to export information to your PSA. Refer to the instructions below.

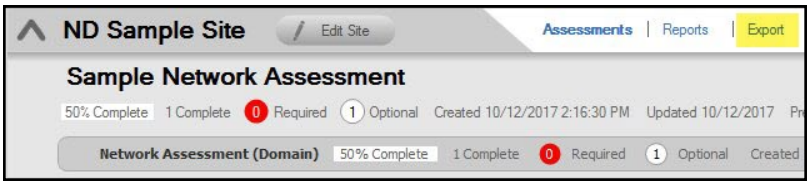
Once you have created the connection, you can then use the **Export** features:

- "Create Tickets from Assessment Issues and Recommendations from Network Detective to PSA" below

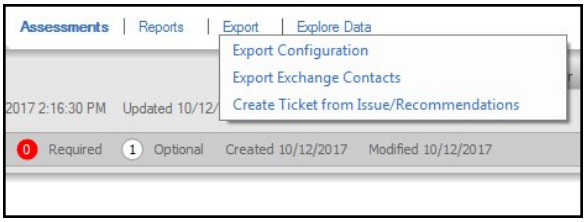
Create Tickets from Assessment Issues and Recommendations from Network Detective to PSA

Network Detective allows you to create tickets from Issues and Recommendations identified during the assessment. To create and export tickets to your preferred PSA system:

1. Open the **Site** and **Assessment Project** for which you wish to create tickets.
2. Within the Assessment window, click **Export**.

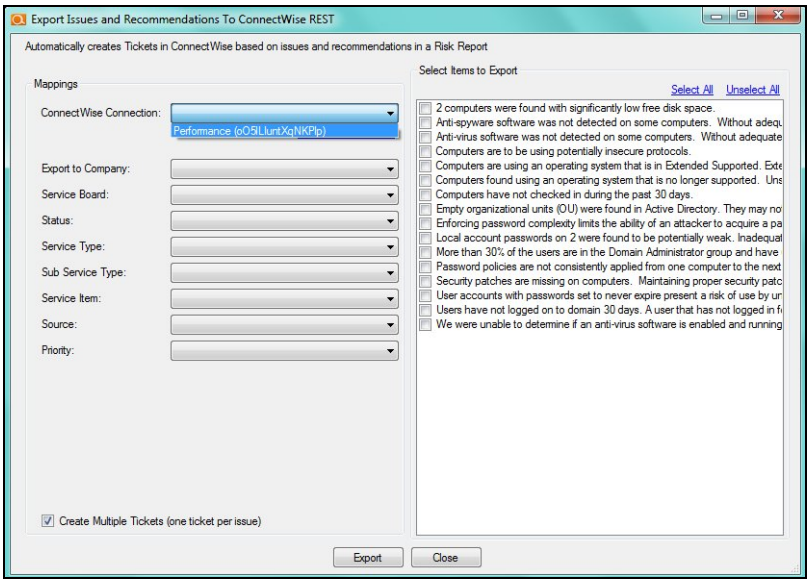


3. Click **Create Ticket from Issues/Recommendations**.



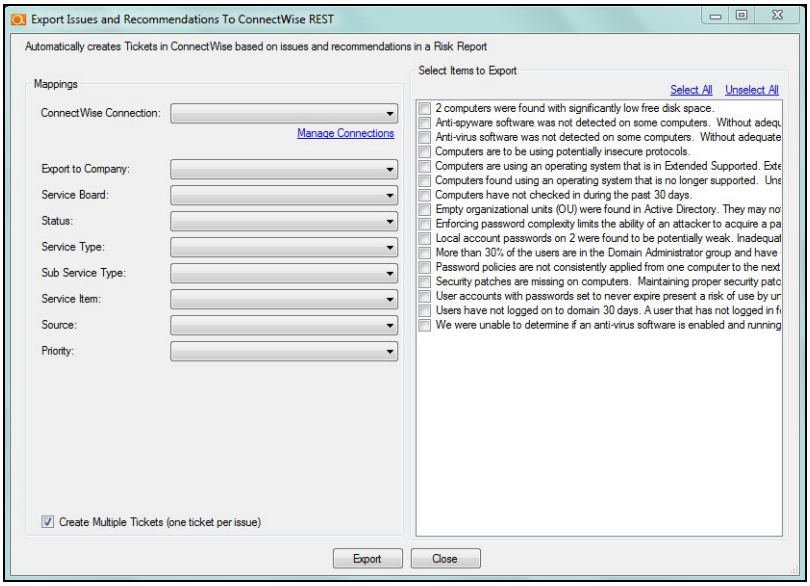
4. Select your preferred **Target** PSA from the menu.

5. The **Export Issues/Recommendations** window will appear.
6. Select a **Connection** from the drop-down menu. The Connection determines the specific PSA account to which the tickets will be exported.



Important: If you have not yet created a connection, see "Integrate Network Detective with a PSA System" on page 36 and follow the instructions there. Then return to this help topic.

> **Note:** When the Connection between Network Detective and the PSA is established, some of the fields in the Mapping menu will automatically populate. This may take up to 60 seconds.

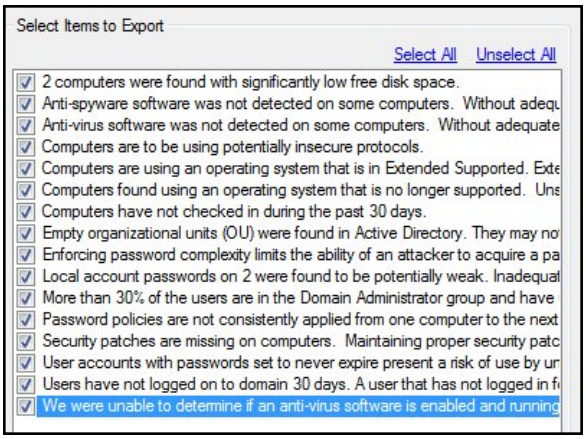


7. Map the issues to service ticket fields in your PSA. These mappings allow you to configure how the issues in Network Detective are created as tickets in your PSA.

> **Important:** You configure the values for the mapping fields in your PSA system. Ensure the values are correctly configured in your PSA before continuing.

> **Note:** In the **Export Issues and Recommendations** window select the **Create Multiple Tickets** option to create a ticket for each Issue and Recommendation contained within the Items to Export list. Unselect this option to create a single ticket with all of the issues.

8. From the list, **Select Items to Export** to the PSA.



9. Click **Export**. Confirm that you wish to export the issues.

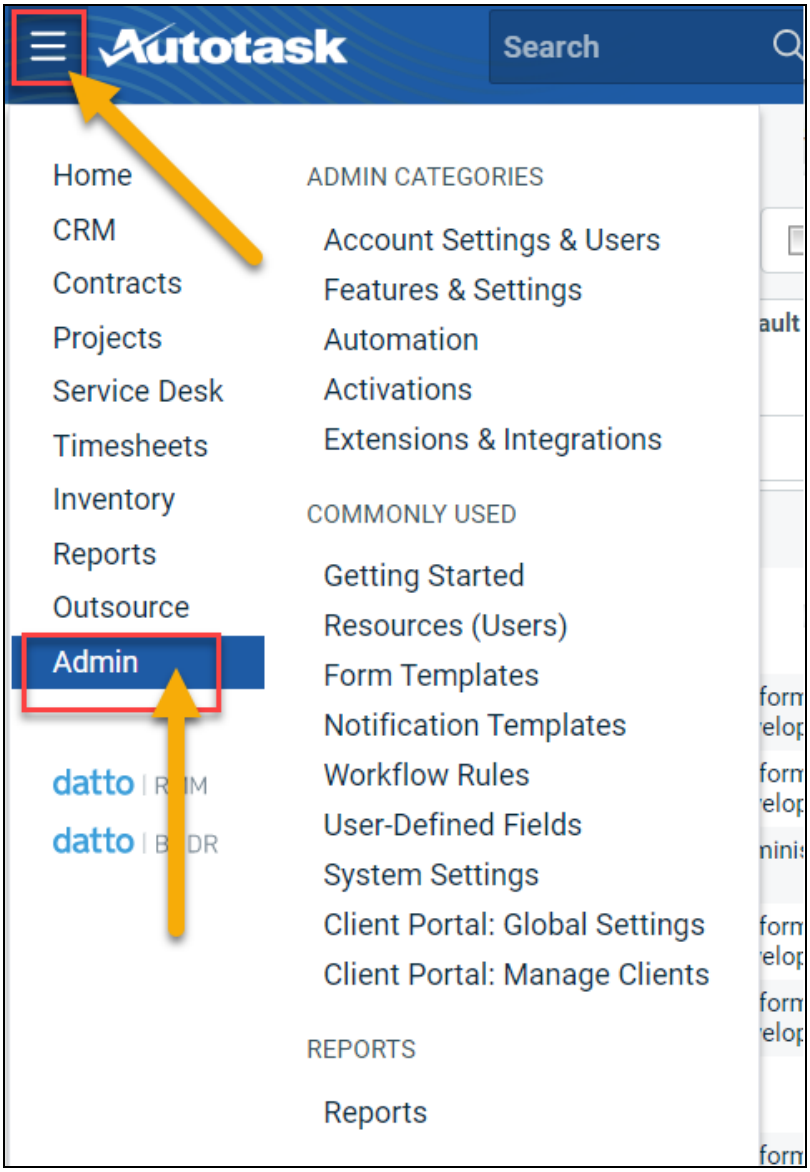
   After the export is complete, an Export Complete status window will be displayed indicating the number of Issues tickets created in the PSA.

Note: You can then log in to your PSA and confirm that your tickets have been created.

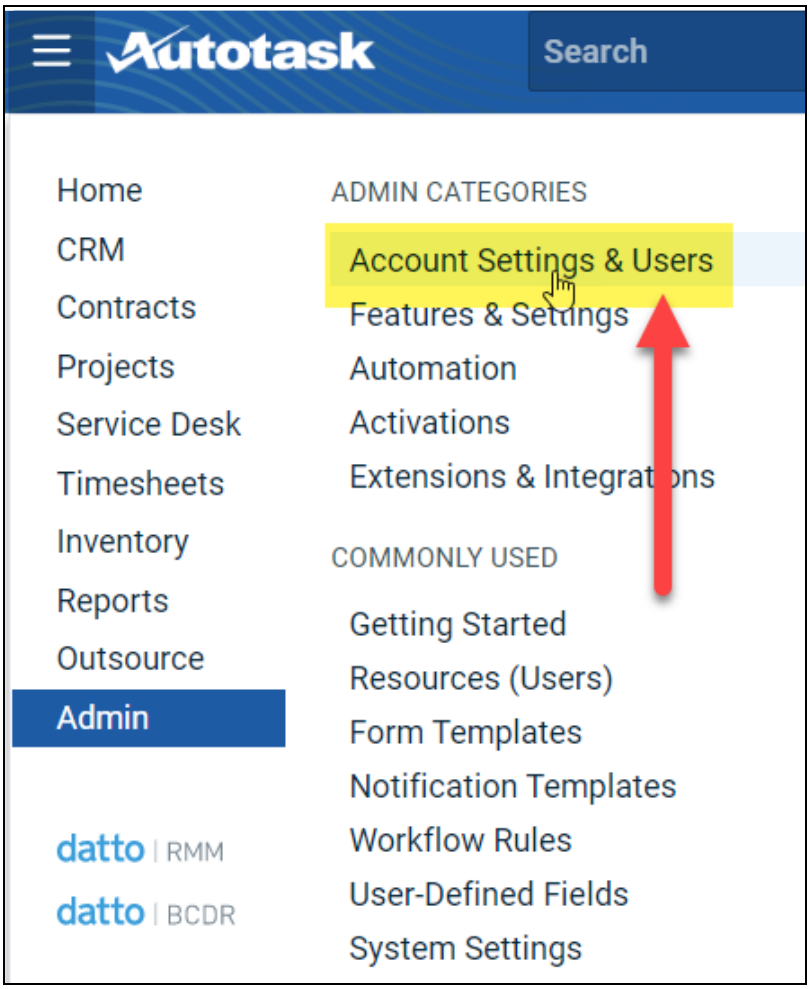
Set Up Autotask Integration

To set up a connection with the Autotask system, you will need to **create an API User in Autotask**. To do this:

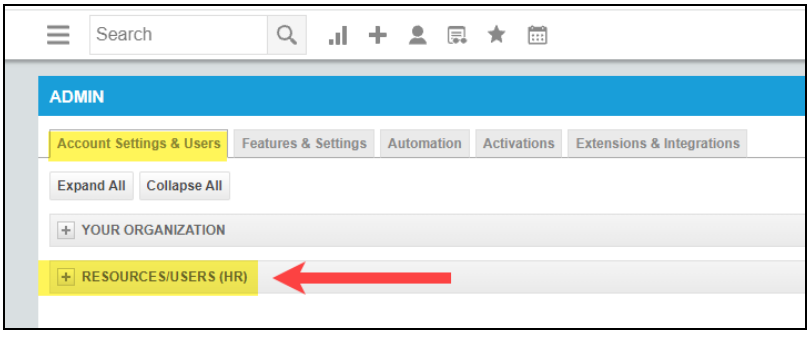
1. Log in to Autotask with your admin user credentials.
2. Click on the **Autotask home** button on the left, then click **Admin**.



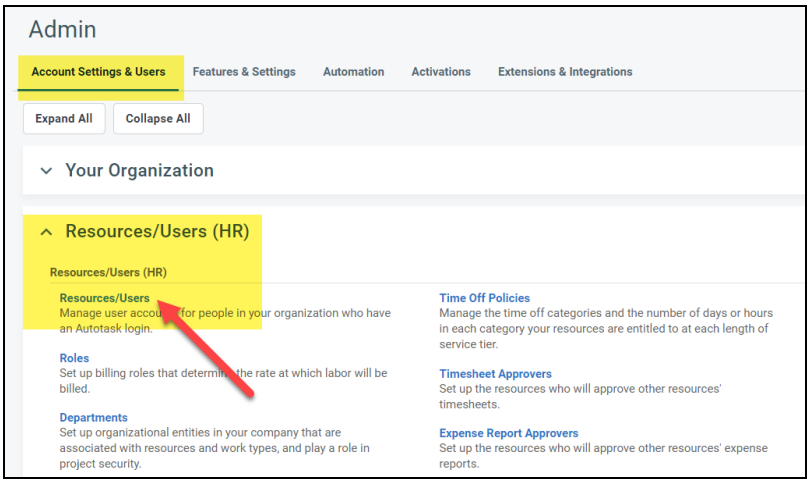
3. From the **Admin** menu, click **Account Settings & Users**.



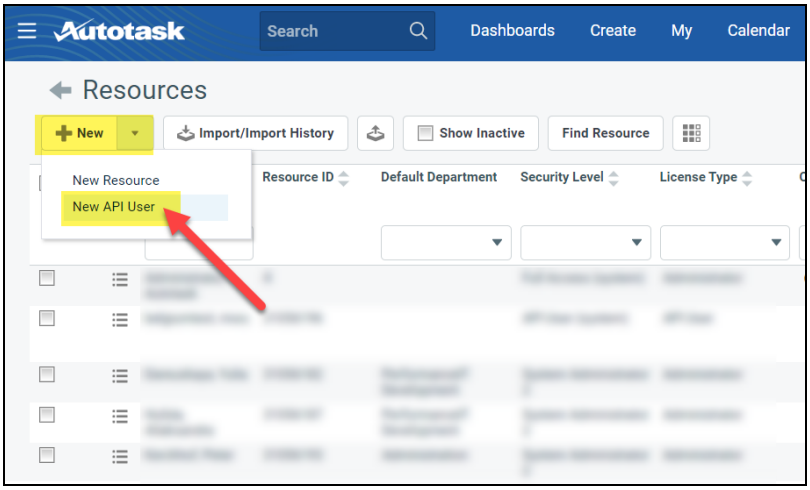
4. Next, click **Resources/Users (HR)** to expand the menu.



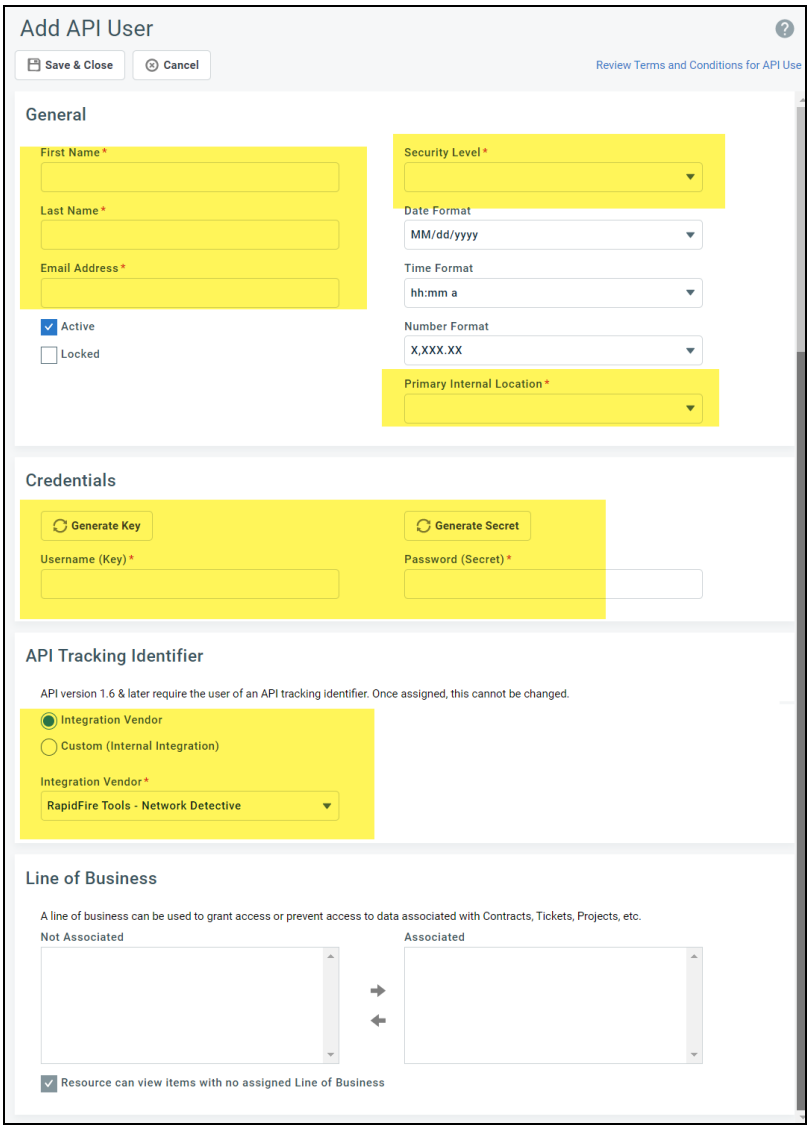
5. Then click **Resources/Users**.



6. Hover your mouse over the drop-down menu to the right of the **New** button, then select **New API User**.



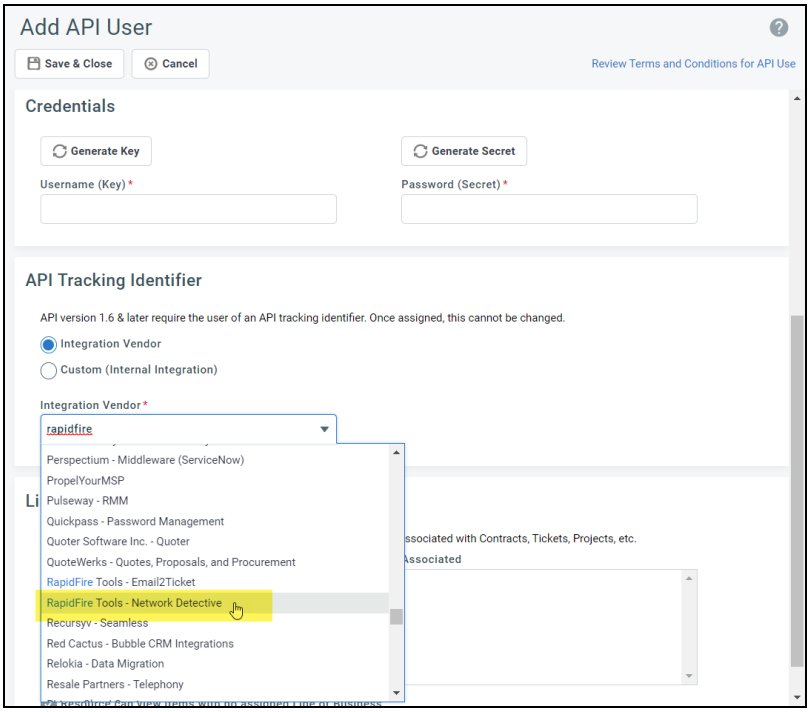
7. Enter information about the API user. Autotask will prompt you to enter the mandatory fields.



- Enter a **first and last name** for the API user.
- Enter an **email address** for the API user.
- From **Security Level**, select **API User (system)**.
- Select a **Primary Internal Location** for the API user.
- Enter/generate a **username** for the API user, then enter/generate a **password**.

> **Note:** Take note of these credentials as you will enter these in Network Detective to enable the API integration.

- Under **API Tracking Identifier**, select **Integration Vendor**. Then select **RapidFire Tools — Network Detective**.



8. When you are finished configuring the new API user, click **Save & Close**. The new user will appear in the list.

Set Up ConnectWise REST Integration

To set up a connection to ConnectWise Ticketing system using the REST API you will be required to:

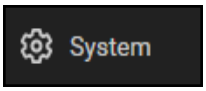
Step 1 — Download and Install the ConnectWise Manage Internet Client Application

To enable the integration, you will need to use the ConnectWise Manage Internet Client application. Download and install the app from http://university.connectwise.com/install/. Then log in using your credentials.

If you are using the ConnectWise Manage web app, you can continue to use the web app after you have completed the steps in this guide and enabled the integration.

Step 2 — Select the ConnectWise Ticket System API Member Account to Integrate with

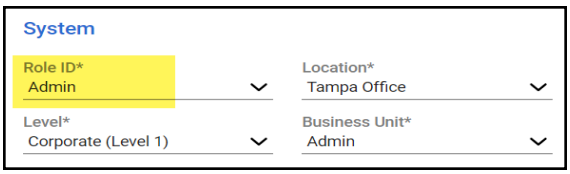
1. From the ConnectWise dashboard, click **System** from the side menu.



2. Next, click **Members**.
3. Click on **API Members Tab**. The API Members screen will appear.

   Note that the API Members Tab may not show by default and may need to be added. You can add this tab from the Tab Configuration menu on the Members page  .

4. Click on the  button to create a new API Member. Fill in all required information.
5. Confirm that the API Member has been assigned Admin rights by checking the member's **Role ID** under **System**.



Important: By default, the API Member must have **Admin** rights for the integration to function correctly. However, we provide a "least privilege" custom solution for the API Member Role ID below. See "Create Minimum Permissions Security Role for API Member" below.

Create Minimum Permissions Security Role for API Member

If you do not wish to assign the API member full Admin rights, create this custom security role and assign it to the API member:

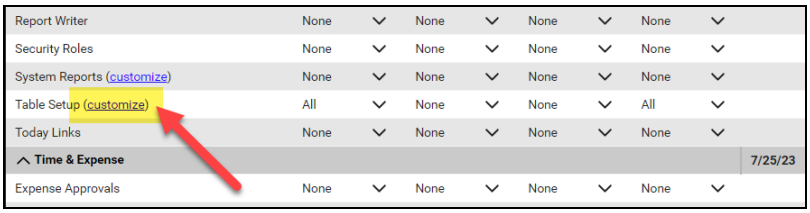
1. Go to **System** > **Security Roles**.
2. Click the + button to create a new security role.
3. Set the permissions for the Role as detailed in the table below and click **Save**.
4. Assign this custom Security Role to the API Member instead of full Admin.

Module		Add Level	Edit Level	Delete Level	Inquire Level
Companies					
	Company Maintenance				All
	Configurations	All	All		All
	Contacts	All	All		All
Service Desk					
	Service Tickets	All	All		All
System					
	API Reports				All
	Table Setup* *Customized Table Setup: Allow Company / Company Status, Company / Configuration, Opportunities / Opportunity Status,	All			All

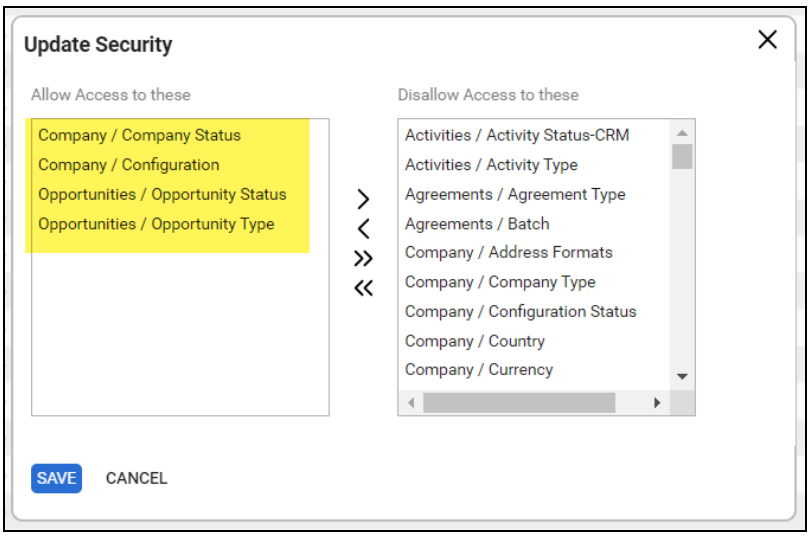
Module		Add Level	Edit Level	Delete Level	Inquire Level
	Opportunities / Opportunity Type (See "Table Setup Configuration" below below for an extended explanation)				

Table Setup Configuration

From Table Setup, click **customize**.



Allow access to the items listed in the table above under **Table Setup**. You can also refer to the image below.

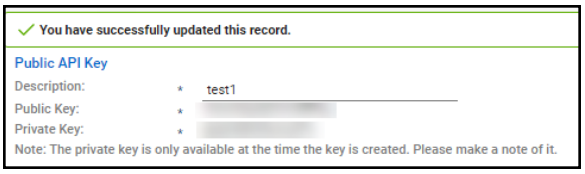


Step 3 — Create an API Key in the ConnectWise Ticketing System

1. Select the API Member that you created previously.
2. From the API Member details screen, click **API Keys**.

3. Click the [+] button.
4. Enter a **Description** for the API Key.
5. Click **Save**.
6. The newly generated API Key will appear.
7. Write down or take a screen shot of the Member's Public and Private API Key strings. This information will be required to set up the integration with ConnectWise.

Important: Note that the Private Key is only available at the time the key is created. Be sure to copy the keys for your records.



Step 4 — Configure Service Tables in ConnectWise

In order to export issues as tickets in ConnectWise, you will need to configure several **Service Tables** in ConnectWise. These tables ensure that the issues are "mapped" correctly to the tickets created within ConnectWise. You must configure the Service Tables correctly in order to establish the connection with ConnectWise.

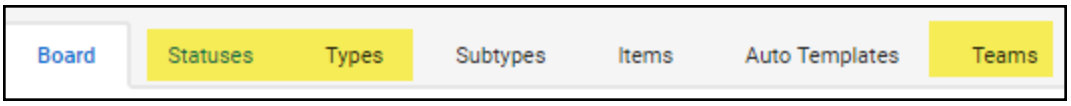
You can configure the Service Tables in ConnectWise from **System > Setup Tables > Category > Service**. Configure the Service Tables as detailed below:

1. **Service Board**

   You must have a Service Board created within ConnectWise. In addition, within the Service Board, you must create values for the following fields. You can create values for these fields from the Service Board page:

a. **Statuses**
b. **Types**
c. **Teams**

You must create at least one value for each of these fields.



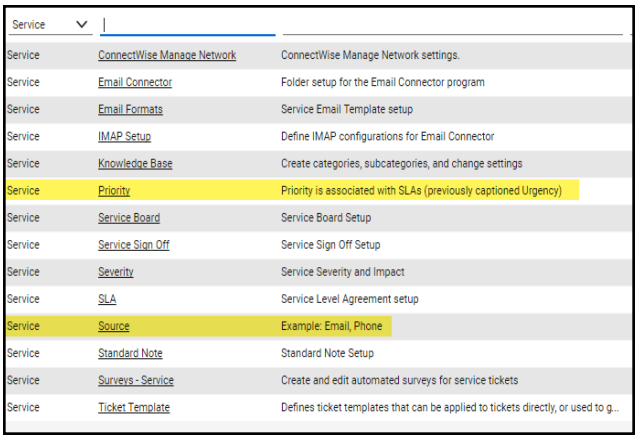
In addition, you must define values for two additional Service Tables:

2. **Source**

   You must include at least one Source.

3. **Priority**

   You must include at least one Priority level.



If your existing Service Tables already contain values for the fields listed above, you do not need to create new values.

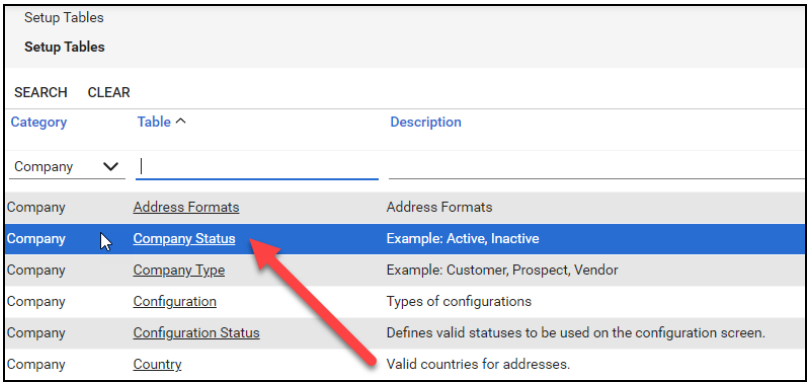
Step 5 — Remove "Disallow Saving" Flag from Company

The final step is to ensure your companies are able to save data such as tickets. By default, your company may have the "**Disallow Saving**" option flag enabled; this will

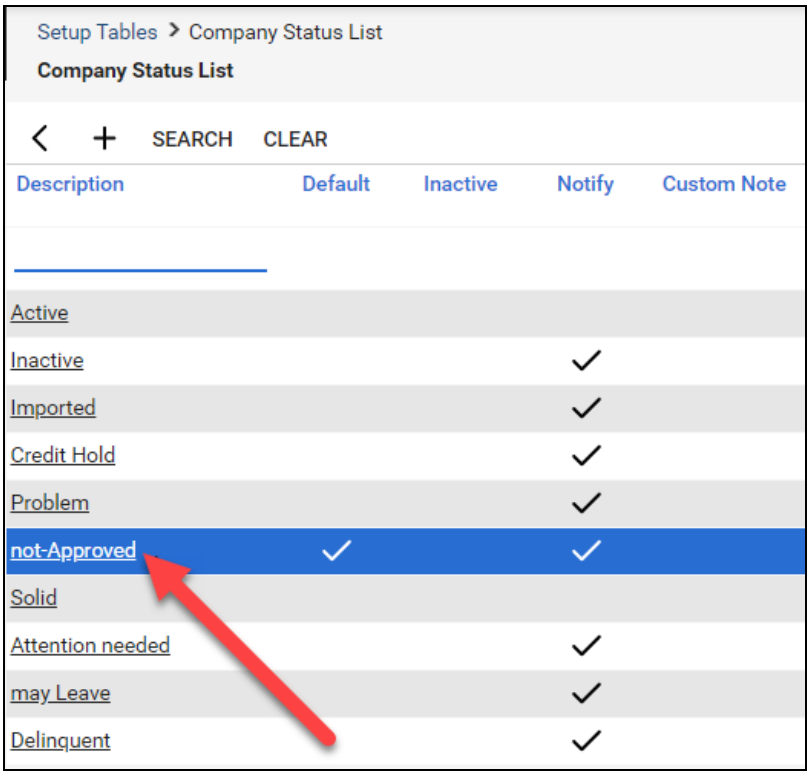
prevent you from exporting tickets to the company.

Here's how to remove the "Disallow Saving" flag:

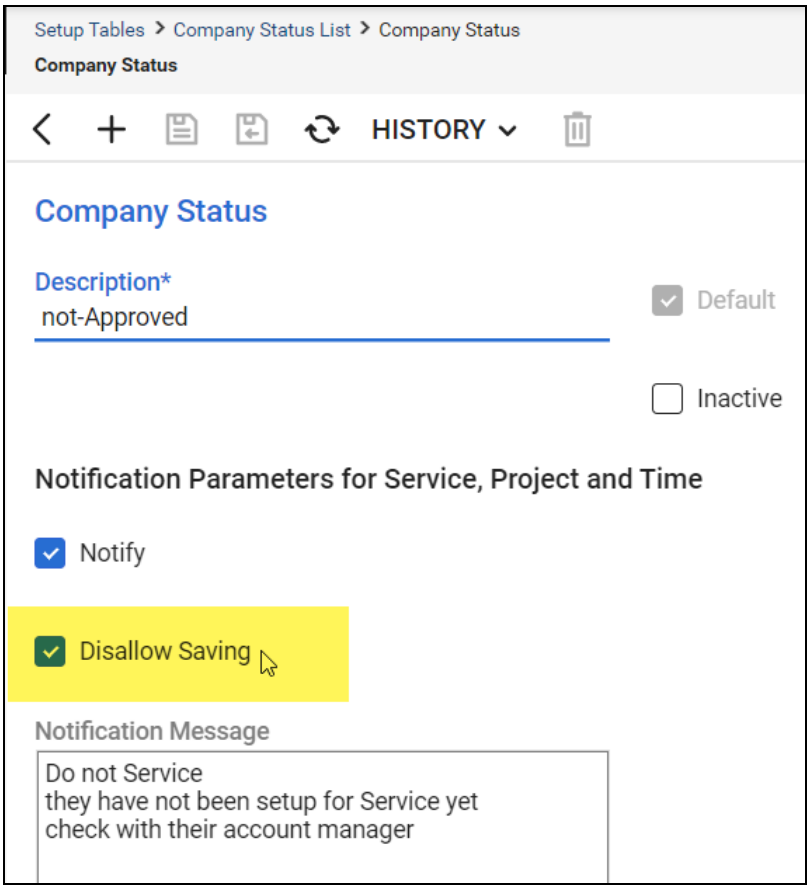
1. Navigate to **Setup Tables** > **Category** > **Company** > **Company Status**.

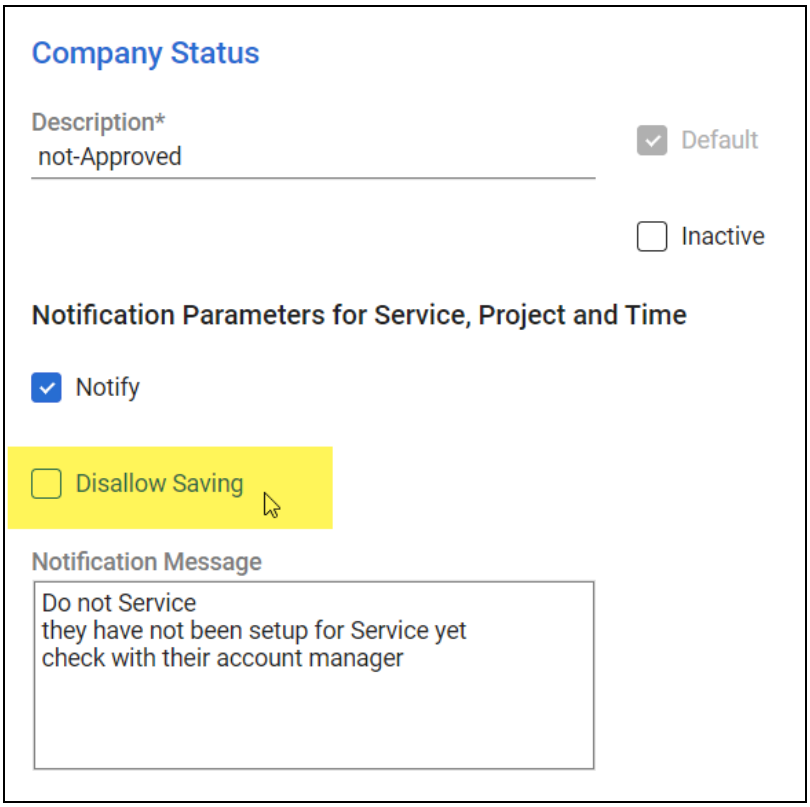


2. From Company Status, open the **not Approved** field.

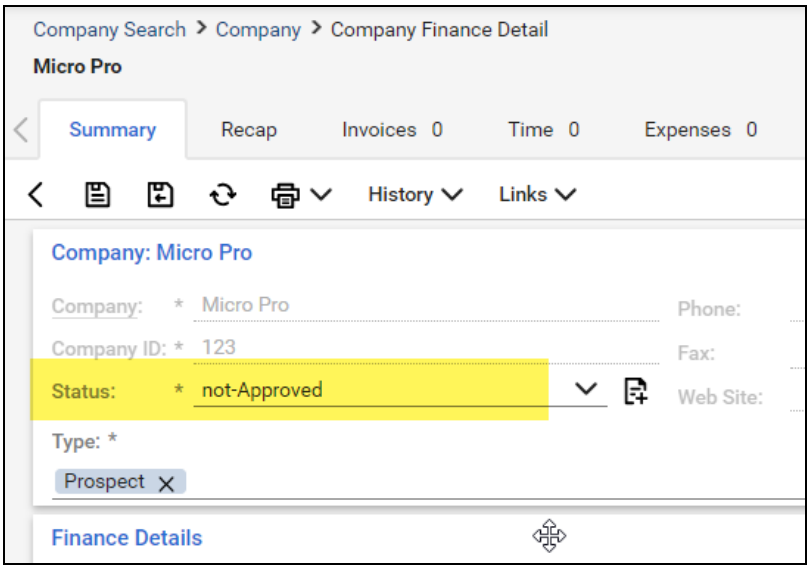


3. Uncheck the **Disallow Saving** flag.





4. This will allow you to export tickets to companies with the **not Approved** status. Alternatively, you can set the company itself to a different status that allows saving before attempting the ticket export.



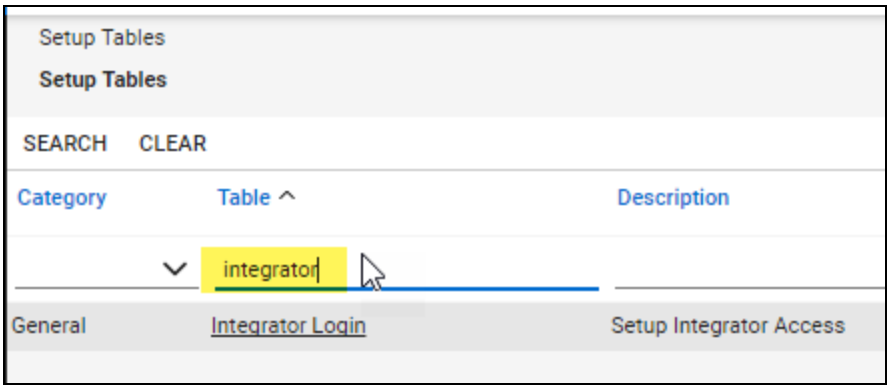
Set Up ConnectWise SOAP Integration

This topic covers how to integrate Network Detective with ConnectWise via the ConnectWise SOAP API.

Important: The ConnectWise SOAP API is in the process of being deprecated by ConnectWise. We recommend that you use the ConnectWise REST API instead.

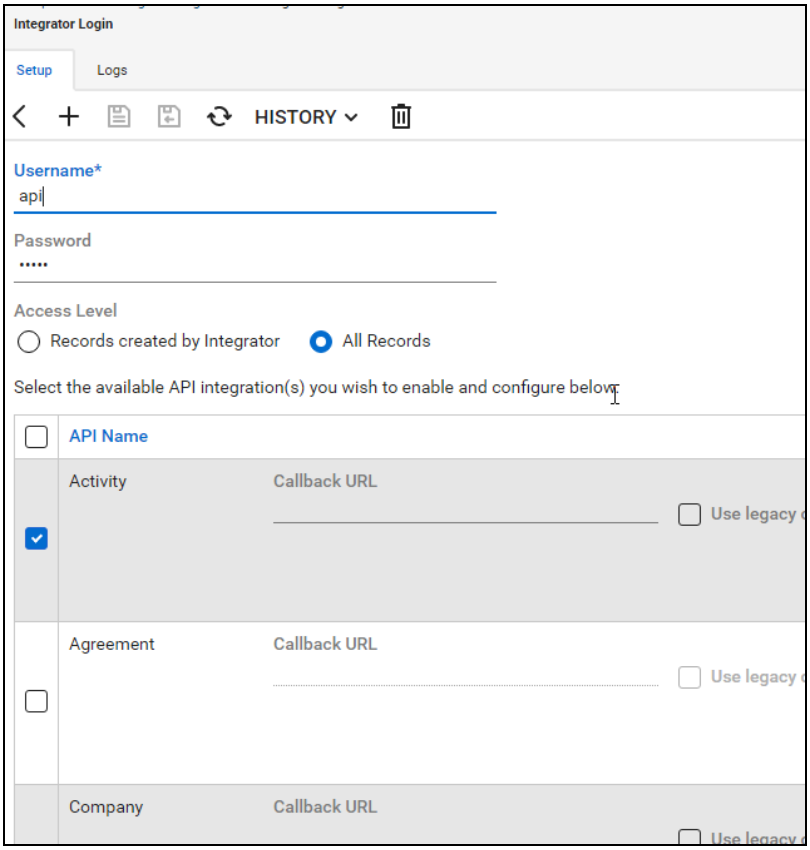
To set up the ConnectWise SOAP integration:

1. Navigate to **System**-> **Setup Tables**.
2. Type "**Integrator**" into the Table lookup and hit Enter.
3. Click the **Integrator Login** link.



4. Click the "**New**" Icon to bring up the New Integrator login screen as shown on the right.
5. Enter and record **Username** and **Password** values which you will need later on when creating a connection in Network Detective.
6. Set the Access Level to "**All Records**."
7. Using the ConnectWise Enable Available APIs function, **enable the following APIs**:
    - ServiceTicketApi
    - TimeEntryApi
    - ContactApi
    - CompanyApi
    - ActivityApi
    - OpportunityApi

- MemberApi
- ReportingApi
- SystemApi
- ConfigurationApi



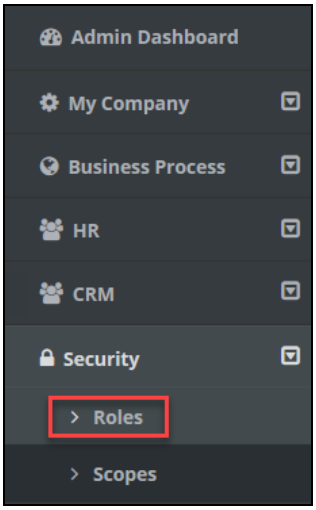
8. Click the **Save** icon to save this Integrator Login.

> **Note:** If you already have an Integrator Login configured, you may use it as long as the Company and Configuration APIs are enabled.)

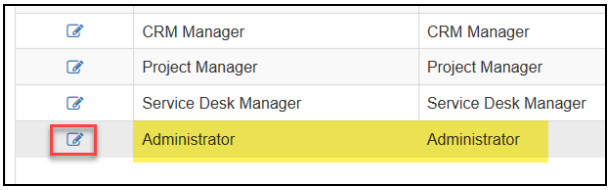
Set Up Kaseya BMS Integration

To export items to Kaseya BMS, you will need Administrator credentials in Kaseya BMS. To assign a Kaseya user to the Administrator role, follow these steps:

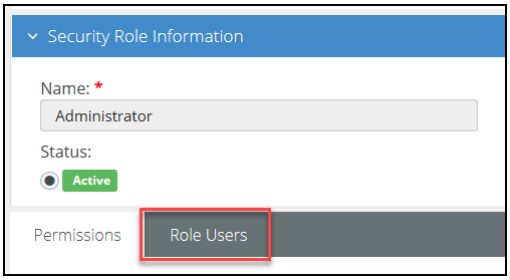
1. Log in to Kaseya BMS.
2. Go to **Security** > **Roles**.



3. Click **Open/Edit** on the Administrator Role.



4. Click the **Role Users** tab.



5. Click **Add**.

6. Search for the user to who will become a Kaseya Administrator and **Select** that user.
7. Click **OK**. This user can now invoke the Kaseya BMS API.