



Autotask PSA API User Setup for AutoElevate Integration

The task of setting up the API user will need to be completed by someone from your organization that is familiar with creating new user accounts in Autotask. Once the API user has been setup and AutoElevate is successfully communicating with your Autotask PSA account the AutoElevate Support Team will complete the configuration and integration via the API.

Here's How to Setup the Autotask PSA API user:

1. Open and Login to Autotask as an administrator
2. From the home menu, click on "Admin" and "Features & Settings"
3. Expand the "Resources/Users" menu and click on the "Resources/Users" sub-menu.
4. Click the "+ New" button to create a new user.
 - A. **General Tab** – enter:
 - i. **First Name***
 - ii. **Last Name**
 - iii. **Email Address****

**Keep in mind that the name entered here will be seen in tickets as the creator of certain notes, so you might use something like "AE-Privilege Management". **

*** The email address entered will be used to receive notices regarding security, such as if the account has been locked out. ***

The screenshot shows the 'RESOURCE MANAGEMENT - New' form in Autotask. The 'General' tab is active. The form fields are as follows:

- Prefix: [Dropdown]
- First Name *: [Text input with 'AE-Privilege' entered, annotated with 'i.']
- Middle Initial: [Text input]
- Last Name *: [Text input with 'System' entered, annotated with 'ii.']
- Title: [Text input]
- Suffix: [Dropdown]
- Gender: [Dropdown]
- Primary Internal Location *: [Dropdown with 'Engineering Office' selected, annotated with a '+' icon]
- Office Phone: [Text input]
- Extension: [Text input]
- Home Phone: [Text input]
- Mobile Phone: [Text input]
- Email Address *: [Text input with 'emailaddress@yourcompany.com' entered, annotated with 'iii.']
- Email Type: [Dropdown with 'Primary' selected]
- Additional Email Address 1: [Text input]
- Email Type: [Dropdown]

B. Security Tab – enter:

Save & Close Save Save & Copy Cancel Tabs with * contain required fields

General * Security * HR * Approvers * Associations * Skills Attachments

SECURITY 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 will require the use of an API tracking identifier.

None

Integration Vendor
AutoElevate - privilege management

Custom (Internal Integration)

Generate

i.

ii.

iii.

iv.

v.

- i. Username (document Username including domain)
- ii. Password & Confirm it (document password)
- iii. Security Level – select “API User (system)”
- iv. Check the box “Resource is not required to Submit Timesheets”
- v. API Tracking Identifier – Select “Integration Vendor”, and then “AutoElevate – privilege management tools” from the drop down

c. **HR Tab** – Set Resource Type, Payroll Type, Internal Cost

d. **Approvers Tab** – Set Timesheet Approvers, Expense Report Approvers

e. **Associations Tab** – Select Associations and set Default Department & Role

5. “Save & Close”

6. Please send the username (including the full URL and password for the account created to support@autoelevate.com with a subject of “Autotask PSA API User is Setup”.