



## 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 selected. The form contains the following fields:

- Prefix: [Dropdown]
- First Name \*: [Text input, value: AE-Privilege] (Annotated with red box 'i')
- Middle Initial: [Text input]
- Last Name \*: [Text input, value: System] (Annotated with red box 'ii')
- Title: [Text input]
- Suffix: [Dropdown]
- Gender: [Dropdown]
- Primary Internal Location \*: [Dropdown, value: Engineering Office]
- Office Phone: [Text input]
- Extension: [Text input]
- Home Phone: [Text input]
- Mobile Phone: [Text input]
- Email Address \*: [Text input, value: emailaddress@yourcompany.com] (Annotated with red box 'iii')
- Email Type: [Dropdown, value: Primary]
- Additional Email Address 1: [Text input]
- Email Type: [Dropdown]

**B. Security Tab – enter:**

- i. Username (document Username including domain)
- ii. Password & Confirm it (document password)
- iii. Security Level – select “API User (system)”. \*\* If you would prefer to restrict permissions for the API user you can create and then apply your own custom Security Level in this field. For the minimum permissions required the AutoElevate API user please see the article entitled: “Datto Autotask PSA Permissions for API User Security Level” found here: <https://support.autoelevate.com/hc/en-us/articles/360029344871>.
- iv.
- v. Check the box “Resource is not required to Submit Timesheets”
- vi. 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. **Send the username, the full URL, and password for the account created to AutoElevate using the instructions contained in the support ticket for your PSA integration** (you should have received an email referencing your PSA integration after purchase of the integration).