

# Worry-Free<sup>™</sup> Remote Manager<sup>™</sup>

for Small and Medium Business



## **Quick Start Guide**

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The user documentation for Trend Micro<sup>TM</sup> Worry-Free<sup>TM</sup> Remote Manager is intended to introduce the main features of the service. You should read it prior to using the service.

Detailed information about how to use specific features within the service are available in the online help, the Getting Started Guide for Resellers, and the Knowledge Base at the Trend Micro Web site.

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## WFRM 2.5 Quick Start Guide

## Introduction

This Quick Start Guide provides information for:

Installing the WFRM Agent on:

- Client Server Security (CS) versions 3.5 and 3.6
- Client Server Messaging Security (CSM) versions 3.5 and 3.6

Registering the following to the WFRM console:

- Worry-Free<sup>™</sup> Business Security Services (WFBS-SVC) version 3.x
- Hosted Email Security version 1.x

Connecting the following to the WFRM console:

- Kaseya
- Autotask

## What is Worry-Free Remote Manager?

Trend Micro<sup>™</sup> Worry-Free<sup>™</sup> Remote Manager (WFRM) enables you to monitor the health of multiple managed networks via multiple, managed products and services. Worry-Free Remote Manager allows reseller administrators to issue commands to manage critical aspects of network security.

WFRM is hosted on regional Trend Micro Data Center servers where resellers obtain an account. Resellers can use Worry-Free Remote Manager to establish customer accounts, monitor customer networks, and manage security using the WFRM console.

Worry-Free Remote Manager (WFRM) presently monitors the following products:

- Worry-Free Business Security Standard (WFBS-S) (formerly CS) versions 5.x, 6.x, 7.x
- Worry-Free Business Security Advanced (WFBS-A) (formerly CSM) versions 5.x, 6.x, 7.x
- Worry-Free Business Security Services (WFBS-SVC) version 3.x

Note: CS/CSM WFBS(A) and WFBS-SVC are collectively referred to as WFBS(ALL)<sup>1</sup> where appropriate.

• Trend Micro<sup>TM</sup> Hosted Email Security version  $1.x^2$ 

Note: CS/CSM WFBS(A), WFBS-SVC, and Hosted Email Security are collectively referred to as "managed products" and/or "managed services" in this document.

Worry-Free Remote Manager has a monitoring dashboard that allows resellers to look into the following aspects of network security:

- WFBS(ALL):
  - Virus, network virus, and spyware/grayware incidents
  - Spam and phishing incidents
  - Unauthorized computer changes
  - Outbreak situations
  - License and update status of security products
  - Disk usage on desktops, servers, and Exchange servers (CS/CSM WFBS(A) only)
  - Key security indicators
- Hosted Email Security:
  - Total Email Message Traffic
  - Accepted Email Message Size
  - Threat Summary
  - Top Spam Recipients
  - Top Virus Recipients

Note: For detailed information on Hosted Email Security and WFBS(ALL), see the documentation for those products.

Worry-Free Remote Manager offers a structured view of customer networks and allows resellers to issue commands and manage the following aspects of network security:

- Component updates and updates to the managed server
- Vulnerability assessment
- Damage cleanup
- Automatic outbreak response
- Firewall and real-time scan settings
- Manual scans

Worry-Free Remote Manager also supports comprehensive reporting features and allows resellers to subscribe individuals to automatically generated reports.

#### Before providing WFRM services ...

Before providing this service to the customer, make sure that you have the customer's consent to perform the following remote management and monitoring activities:

- View the list of computers on the network
- View the following security information:
  - Threat detections

<sup>1.</sup> WFBS(A), WFBS(S), and WFBS-SVC are collectively referred to as WFBS(ALL) where appropriate.

<sup>2.</sup> InterScan Messaging Hosted Security was renamed to Hosted Email Security in WFRM 2.2 SP1.

- Names (and the number) of infected computers
- Names of infected files
- Users that have received infected files or have known MS vulnerabilities
- License and system information of managed servers
- Send email notifications to individuals within the customer's organization
- Perform the following actions:
  - Deploy security components
  - Start or stop manual scans
  - Start or stop Vulnerability Assessment
  - Start or stop Damage Cleanup Services
  - Start or stop Outbreak Prevention Services
  - Update the managed server
- Configure settings for the following items:
  - Outbreak Prevention Services
  - Real-time scan
  - Firewall
  - Location Awareness
  - Behavior Monitoring

#### **Browser Requirements**

- Connection to the Internet
- Internet Explorer<sup>TM</sup> 6.0, 7.0 and 8.0 with the latest service packs
- WFRM logon account information from Trend Micro

#### **Prepare Your Browser**

- Make sure Internet Explorer's security level for Trusted sites is set to medium or low. A more restrictive security level may prevent the console from displaying correctly.
- Make sure pop-up blockers on your Web browser have been disabled or set to allow pop-ups from the WFRM URL. Pop-up blockers can prevent some of the console's pop-up windows from opening.

## Agent Installation for WFBS(A) 5.0/5.1

#### Go to the WFRM Web Console

Go to http://wfrm.trendmicro.com and choose the appropriate region.

#### Add the customer to WFRM

- 1. Log on to the WFRM Web console.
- 2. Click **Customers** (tab) > Add customer (icon at top of left pane).
- 3. Fill in at least the required customer information and click Next.
- 4. Fill in at least the required contact information and click Next.
- 5. Click Add Product/Service Now.
- 6. Select the product to add and click **Next**.

7. WFRM presents you with the Globally Unique Identifier (GUID) for WFBS(A) 5.0/5.1. Save this for installing the Agent on WFBS-A.

#### What is an Agent GUID?

To distinguish between WFRM Agents, Worry-Free Remote Manager assigns a globally unique identifier (GUID) to each Agent. Every time you add a managed server, WFRM generates a GUID for that managed server's Agent. At that point, no Agent program is using the GUID. The administrator who installs the Agent program on the managed server must input the GUID during installation to allow the Agent program to register to the console.

#### Example of a WFRM Agent GUID:

4F6F0F8697C9-A1FFCF63-D833-84D9-1C35

#### Install the Agent on WFBS(A) 5.0/5.1

The Agent installs on the managed server. To ensure that the Agent installation goes smoothly, prepare the following in advance:

- Agent GUID
- Agent installer http://www.trendmicro.com/ftp/products/wfrm/WFRMAgentforCSM.exe

#### The managed server must meet the following requirements:

- 1. WFBS/WFBS-A 5.0 or 5.1
- **2.** Active Internet connection
- 3. 50MB available hard disk space

#### To install the Agent:

- 1. Copy the Agent installation file (WFRMAgentforCSM.exe) to the managed server.
- 2. Open the installation file.
- **3.** Select the installation language.
- 4. The InstallShield Wizard Welcome screen opens. Click Next.
- 5. The License Agreement screen opens. Read the license agreement carefully. If you disagree with the terms of the license agreement, click Cancel to exit the installation. If you agree with the terms, click I accept the terms of the license agreement and click Next.
- 6. Provide your name and the name of your company and click Next.
- 7. The Installation Location screen opens. To use the default location, click Next.
- 8. Provide the FQDN of the Worry-Free Remote Manager server that corresponds to your region in the Server address field.

#### FQDN of Worry Free Remote Manager servers

- Asia Pacific: wfrm-apaca.trendmicro.com
- Europe and the Middle East: wfrm-emeaa.trendmicro.com
- Japan: wfrm-jpa.trendmicro.com
- Latin America: wfrm-lara.trendmicro.com
- North America: wfrm-usa.trendmicro.com
- 9. Select a communication protocol and port:

For HTTPS (recommended), use port 443. Enter the path and filename of the SSL certificate or click the Browse button to locate the SSL certificate (see the "Agent Installation Guide" or "GSG for Resellers" for more information on how to obtain the certificate). Click **Next** (Do not click User Authentication; it is not being used at this time).

10. If the managed server uses a proxy server to connect to the Internet, specify the necessary settings. Click Next.

- 11. Type the GUID. Click Next.
- 12. Review the installation settings and click Next.
- 13. Click Finish to close the wizard after installation completes.

### Agent Pre-installation for WFBS-S/WFBS-A 6.0 and above

Before installing the agent, perform the following high-level steps:

- 1. Add the customer to WFRM.
- 2. Select the product and record the product GUID.

#### Go to the WFRM Web Console

Go to http://wfrm.trendmicro.com and choose the appropriate region.

#### Add the WFBS-S/WFBS-A customer to WFRM

- 1. Log on to the WFRM Web console.
- 2. Click **Customers** (tab) > Add customer (icon at top of left pane).
- 3. Fill in at least the required customer information and click Next.
- Fill in at least the required contact information and click Next.
- 5. Click Add Product/Service Now.
- 6. Select the product to be added and click Next.
- WFRM presents you with the Globally Unique Identifier (GUID) for WFBS-S/WFBS-A. Save this for installing the Agent on WFBS-S/WFBS-A.

#### What is an Agent GUID?

To distinguish between WFRM Agents, Worry-Free Remote Manager assigns a globally unique identifier (GUID) to each Agent. Every time you add a managed server, WFRM generates a GUID for that managed server's Agent. At that point, no Agent program is using the GUID. The administrator who installs the Agent program on the managed server must input the GUID during installation to allow the Agent program to register to the console.

#### Example of a WFRM Agent GUID:

4F6F0F8697C9-A1FFCF63-D833-84D9-1C35

Now you can install the WFRM agent. For installation procedures, refer to the WFBS Installation Guide. If the installation is successful and settings are correct, the Agent should automatically register to the Worry-Free Remote Manager server. The Agent should show as Online on the WFRM console.

### **Registering WFBS-SVC to WFRM**

This section contains information for registering Worry-Free™ Business Security Services to the WFRM console.

#### Add the WFBS-SVC customer to WFRM

- 1. Log on to the WFRM Web console.
- 2. Click **Customers** (tab) > Add **customer** (icon at top of left pane).
- 3. Fill in at least the required customer information and click Next.

- 4. Fill in at least the required contact information and click Next.
- 5. Click Add Product/Service Now.
- 6. Select Worry-Free<sup>TM</sup> Business Security Services and click Next.
- 7. WFRM presents you with an Authorization Key. Save this for attaching WFBS-SVC to the WFRM console.

#### Enter the Authorization Key on WFBS-SVC

In order to manage Worry-Free Business Security Services from the WFRM console, a customer's WFBS-SVC account must register with WFRM by carrying out the following:

- 1. Log on to the customer's WFBS-SVC account.
- 2. Click Administration > Worry-Free Remote Manager.
- 3. Type the Authorization Key and click Connect.
- 4. You will be informed if the connection was successful.

## **Registering Hosted Email Security to WFRM**

This section contains information for registering InsterScan Messaging Hosted Security to the WFRM console.

#### Add the Hosted Email Security customer to WFRM

- 1. Log on to the WFRM Web console.
- 2. Click **Customers** (tab) > Add customer (icon at top of left pane).
- 3. Fill in at least the required customer information and click Next.
- 4. Fill in at least the required contact information and click Next.
- 5. Click Add Product/Service Now.
- 6. Select Hosted Email Security and click Next.
- 7. WFRM presents you with an Authorization Key. Save this for attaching Hosted Email Security to the WFRM console.

#### Enter the Authorization Key on Hosted Email Security

- 1. Log on to the customer's Hosted Email Security account.
- 2. Click Administration > Remote Manager.
- 3. Enter the Authorization Key and click Connect.
- 4. You will be informed if the connection was successful.

## **Verifying Agent-Server Connectivity**

#### To verify the WFRM Agent has registered with the WFRM server:

- **1.** Log on to the WFRM Web console.
- 2. Click Customers (tab) > All Customers (on the tree) > All Agents (right pane)
- 3. The tab lists the status of each Agent in the Status column.

You may now start managing the customer's managed servers from the WFRM console.

For more information on how to use WFRM, read the Worry-Free Remote Manager Getting Started Guide for Resellers or the Online Help.

## Integrating Kaseya with WFRM

#### Kaseya Settings in WFRM

Add Kaseya email accounts and notification recipient to the WFRM console as follows:

1. Click Administration > Account Information.

The Account Information tab appears.

t account information, reseller profile, and per	sonal settings.
Account Information Reseller Profile	Personal Settings
Logon name:	(and the second
Logon password:	******** Change password
Full name:*	Profession (Contraction)
Address:	
Zin Code:	
210 2000.	1 ·
Telephone:	
Mobile phone:	
Email.*	and the second sec
MSN:	
<u></u>	Enable event alerts via other applications.
	Linked applications: Kaseya : (Remove)
Notifications via other applications. *These notifications are configured under	Kaseya More info.
Customers > notifications.	annual = fit port
	Add

FIGURE 1-1. Account Information Notifications Group Box

- 2. Click Enable event alerts via other applications and select Kaseya from the Linked applications drop-down list.
- 3. Add the Kaseya user email and click Add.
- 4. Kaseya appears as a linked application. Click Save.

 Add the notification recipient for the Kaseya user under Customers > Notification > Notification Recipient (Edit).



FIGURE 1-2. Customers > Notification > Notification Recipient Screen

#### **Settings in Kaseya**

1. In Kaseya, add the following fields to the ticketing system in order to show WFRM notifications.

TABLE 1-1.	Kaseya ticketing fields
------------	-------------------------

FIELD NAME	PURPOSE
TM_CreateTime	Event generation time
TM_ProductName	Product name
TM_AgentGUID	RM agent GUID
TM_CustomerName	Customer/Company name
TM_EventName	Event name
TM_MSAName	Exchange server name (only affects the Exchange Server Shutdown event)
TM_ServerName	CSM/WFBS server name (affect all events except Exchange Server Shutdown)

🍯 Kaseya Managed Services Ec	dition - Microsoft Internet Explorer	×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u>	Iools Help	1
🎯 Back 🔹 🕥 👻 📓 🐔	🔎 Search 🛭 👷 Favorites 🛛 🚱 🕶 😓 🚍	
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	Home Audit Scripts Monitor Ticketing Patch Mgmt Remote Cntl Reports Agent System	em
	aseya Managed Services Edition Log Off: administra	ator
📡 Status 📮 Notes	Machine ID Rows Select Machine Group Select View Reset 1 machine	
🚱 Help	<	105
Function List	SLA Type List 💌 None 💌 🗙	
Manage Tickets	Dispatch Tech List 🔽 No 💽 🗙	
Create/View	Approval List 🔹 Not required 💌 🗙	
Delete/Archive	Hours Worked Number (nn d) V 0.0	
Configure Ticketing		
Notify Policy     Access Policy		
Assignee Policy	TM_ServerName String 🔄	
Due Date Policy	TM_CustomerName String 🔽 🗙	
Email Reader	TM AgentGLIID String	
Email Mapping		
Define User Access	TM_ProductName   String	
User Profiles	TM_CreateTime String 🔽	
I Oser Access	TM_MSAClientName String	
		•
ē	- New York Contract Contract	//

FIGURE 1-3. Kaseya Ticketing Fields

2. Ensure that the email setting is correct as on the following screen:



FIGURE 1-4. Kaseya Email Settings

When an event is triggered, Kaseya will receive the ticket as on the following screen:

🍘 Kaseya Mana <mark>ged Services</mark> E	dition - Microsoft Internet Explorer		
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	Tools Help		A
🔇 Back 🝷 🕤 👻 📓 🐔	🔎 Search 🛭 👷 Favorites 🛛 🥹		
Address 🙋 http://localhost/Troub	leTicTab/mainTroubleTic.asp?activeId=6002		💌 🄁 Go 🛛 Links 🌺
	Home Audit Scripts Monitor	Ticketing Patch Mgmt Ren	note Cntl Reports Agent System
	aseya Managed Services Edition		Log Off: administrator
Status 📄 Notes	Machine ID Rows	Select Machine Group S	elect View Reset 1 machines
м нер	<< < < < < < < < < < < < < < < < < < <	C Assignee:	<ul> <li>unassigned &gt;</li> </ul>
Function List	Email: Basera Solim com	Category:	Application problem
Manage Tickets	Phone:	Status:	Open 🔽
Create/View	Date Created: 2:50:50 em 12 Jul 00	Priority:	High
Delete/Archive	Age: -67 days 15 hrs	SLA Type:	None
Configure Ticketing	Date Due: 🗐 🕼 3:59:50 am 14-Jul-09	Dispatch Tech:	No
Access Policy		Approval:	Not required 📃
Assignee Policy		Hours Worked:	0.0
Edit Fields		TM_EventName:	CS(M)-WFBS(A) Server Shutdow
Email Reader		TM_ServerName:	W2K3ENTSP4
Define User Access		TM_CustomerName:	Customer1ForReseller2
User Profiles		TM_AgentGUID:	ADDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDD
User Access		TM_ProductName:	Customer1ForReseller2
🛃 Done		Kaseva Mapaged	Services Edition - Microsoft Internet Explorer

FIGURE 1-5. Kaseya Event Ticket

## Integrating Autotask with WFRM

#### Autotask Settings in WFRM

Add Autotask authentication to the WFRM console as follows:

1. Click the Administration > Account Information tab.

The Account Information tab appears.

ministration				
account informatio	n, reseller profile, and pers	conal settings		
account Informati	ion Reseller Profile	Personal Settings		
.ogon name:		reseller2		
.ogon password:		******	Change ;	bassword
ull name:*		reseller2		
Address:				
				*
Zip Code;				
'elephone:		1 F		
Nobile phone:		1		
imail:*		the star of the same of		
ASN:				-
		🔽 Enable event alert	s via other applications.	
		Linked applications:		
		Autotask		More info
These notifications	are configured under	Logon ID	and them.	-
Sustomers > notifica	ations.	Password	the start	_
		russmoru		
		Add		
lote:				
				+

FIGURE 1-6. Account Information > Notifications via other applications

- 2. Click Enable event alerts via other applications and select Autotask from the Linked applications drop-down list.
- 3. Add the Autotask logon credentials and click Add.

**Note:** Find the Autotask account ID and password on the AutoTask UI (**Admin > AutotaskExtend > Tools > Add Ticket E-mail Service**).

Autotask appears as a linked application.

- 4. Click Save.
- 5. Ensure that Autotask is added to the list of recipients on Customers > Notification> Notification Recipient.

6. Click Customers > All Customers.

The All Customers tab appears with customer information and unique IDs.

ustomers							
dd and manage customers and products.	id customer						
earch customers	Q						
View by: All Customers -		All C	ustomers	All Agents	Default Notifications		
1 - 100 / 428    + + Page 1 of 9	5 <b>+</b> +1	1	Delete 🔂 E	xport all	10 0 P	age 1 of 33 🔶	♦I 25 ▼ per pag
🖻 👼 All Customers	*		Customer	Name 👻	Services Product	Expiration Date	Unique ID
🗄 🙇 Carlos, Contorner			C. Andrews	18	WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-27
🗉 🔏 Tanaki Kuu kano			2,1400		WFBS-SVC(Z_c_BS-SVC1)	N/A	WFRM-AUTOTASK-27
🖻 🔏 Z_continuer_1939			1,000	10	WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-26
🗄 🙇 Z_punktorner_HTM	=		2,1000		WFBS-SVC(Z_c_BS-SVC1)	N/A	WFRM-AUTOTASK-26
E 🙆 Z_continue_100			1,000	10	WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-25
🗄 🔁 Z., mannener, 1939			2,1000	100	WFBS-SVC(Z_c_BS-SVC1)	N/A	WFRM-AUTOTASK-25
🖻 👝 Z., pastierner, 198			1,000		WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-24
🖻 👝 Z., randomer., 1001			2,1000		WFBS-SVC(Z_c_BS-SVC1)	N/A	WFRM-AUTOTASK-24
🗄 🙇 Z_coaliterer_118			2,0000	10	WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-23
🗄 🔏 Z., matterner, 100			2,1000		WFBS-SVC(Z_c_BS-SVC1)	N/A	WFRM-AUTOTASK-23
🗄 🔏 Z_rominener_1980			1,0000	34	WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-22
🗄 🙇 Z_numberer_1176			2,1000	.94	WFBS-SVC(Z_c_BS-SVC1)	N/A	WFRM-AUTOTASK-22
E 者 2_contener_1718			1,0000		WFBS-SVC(Z_c_BS-SVC2)	N/A	WFRM-AUTOTASK-21

FIGURE 1-7. Customers> All Customers Tab with Unique IDs

7. Click Export to download the customer unique IDs.

The File Download screen appears asking if you want to save the Exported-Customer-UniqueID.xls file.

8. Save the export file. You will enter the unique ID in the Autotask Trend Micro Site ID field later.

**Note:** If you did not select Enable event alerts via other applications on the Administration > Account Information screen, the unique ID does not display on this page.

#### **Settings in Autotask**

In Autotask, add the following fields to the ticketing system in order to show WFRM notifications (Admin > Service Desk > Issue and Sub-Issue Types > Managed Services Alert).

TABLE 1-2.	Autotask ticketing fields
TADLL I-2.	Autotask licketing helus

FIELD NAME	Purpose
Trend Micro Threat Events	Managed services alerts for WFRM notification. There are four default event categories
Trend Micro System Events	
Trend Micro License Events	
Trend Micro Other Events	

	Issue Types	
Admin	New	
Getting Started	Issue Type Name	
H- CRM	Computer problem	
<ul> <li>Contracts (and Billing)</li> </ul>	Fileserver	
Projects	Hardware Problem	
Service Desk     Joshboard	Managed Services Alert	
Issue and Sub-Issue Types	Sales Process	
Ticket Priorities	https://www.autotask.net/administrator/serviceDesk/IssueMgt/issueEdit.asp?iss	
Tracet Sources     Tracet Statuses     User-Defined Fields     Workflow Policies     Timesheets     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X Delete       SubIssue Type       Dick Snare	Issues
Track Sources     Track Statuses     User-Defined Fields     Workflow Policies     Tracksteps     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend     LiveRootts Administration	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X       Delete     Sub       SubIssue Type       Disk Space       Network Monitoring Alert	Issues
Track Sources     Track Statuses     User-Defined Fields     Workflow Policies     Timesheets     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend     LiveMobile     LivePorts Administration     LiveLinks	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X       Delete     Sub       SubIssue Type       Disk Space       Network Monitoring Alert       Off Line	Issues
Trace I sources     Trace I statuses     User-Defined Fields     Workflow Policies     Transheets     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend     LiveRwohile     LiveReports Administration     LiveReports	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X Delete       SubIssue Type       Disk Space       Network Monitoring Alert       Off Line       Performance	Issues
Track Sources     Track Statuses     User-Defined Fields     Workflow Policies     Imenhets     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend     LiveMobile     LiveReports Administration     LiveReports     Reports     Downloads	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X       Delete     Sub       SubIssue Type       Disk Space       Network Monitoring Alert       Off Line       Performance       Security Alert	Issues
Tracet Statuses     Tracet Statuses     User-Defined Fields     Workflow Policies     Timesheets     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend     UveMobile     UveRports Administration     LiveReports     Reports     Downloads     Utilities	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X Delete       SubIssue Type       Disk Space       Network Monitoring Alert       Off Line       Performance       Security Alert       Trend Micro License Events	Issues
Track I Statuses     Track I Statuses     User-Defined Fields     Workflow Policies     Track I Statuses     Inventory     Products and Services     Knowledgebase     Client Access Portal     AutotaskExtend     LiveRoprits Administration     LiveReports     Reports     Downloads     Utilities	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X Delete       SubIssue Type       Disk Space       Network Monitoring Alert       Off Line       Performance       Security Alert       Trend Micro License Events       Trend Micro Other Events	Issues
Indet sources     Ticket Statuses     User-Defined Fields     Workflow Policies     Innentory     Innentory     Clent Access Portal     Clent Access Portal     LiveReports Administration     LiveReports     Reports     Downloads     Utilities	Image: Save and Close     Cancel       Issue Type :     Managed Services Alert       Issue Type :     Inactive       New     X Delete       SubIssue Type     Disk Space       Disk Space     Network Monitoring Alert       Off Line     Performance       Security Alert     Trend Micro Uter Events       Trend Micro Other Events     Trend Micro Other Events	Issues
Indet Softes     Ticket Statuses     User-Defined Fields     Workflow Policies     Innentory     Innentory     Inventory     Client Access Portal     Client Access Portal     LiveReports Administration     LiveReports     Reports     Downloads     Utilities	Issue Type :       Managed Services Alert         Issue Type :       Inactive         New       X Delete         Subissue Type       Disk Space         Disk Space       Off Line         Performance       Security Alert         Trend Micro Ucense Events       Trend Micro System Events         Trend Micro System Events       Trend Micro System Events	Issues

FIGURE 1-8. Trend Micro Sub-issue Types

 Ensure that the email setting is correct as on the following screen (Admin > AutotaskExtend > Tools > Add Ticket E-mail Service):



FIGURE 1-9. Ticket Email Service Settings

 Create the Trend Micro Site ID field as on the following screen (Admin > Site Setup > User-Defined Fields):



FIGURE 1-10. Trend Micro Site ID Definition

Input the WFRM unique ID in the new Trend Micro Site ID field as on the following screen (CRM > Accounts > select Account > edit Account).

Account		0
ave and Close 🛛 🗱 De	elete LiveLinks 🔻 沒 Cancel	
General User Defined Child	Accounts Site Configuration Alerts	
Stock Symbol		
Stock Market		
SIC Code		
Asset Value		
Account Description*		
Account Ext (Rong Bo)*	03/02/2010	
Email List		2
Managed Services Site ID		
Newsletter List		
Number of Employees		
Deveryor	0	
Revenue	-	
Telemarketing Status		
Trend Micro Site ID*	Type unique ID here.	

FIGURE 1-11. Account Trend Micro Site ID Field

Note: This is the unique ID exported from WFRM. See Autotask Settings in WFRM on page 1-11

When an event is triggered, Autotask will receive the ticket as on the following screen:



FIGURE 1-12. Autotask Ticket Details

## **Contacting Support**

For support contact information (telephone and email address), visit the following site:

http://www.trendmicro.com/support/WFRM