Ivanti Automation
Quick Start Guide for Ivanti Service Manager Connector

1.0.0

Contents

Chapter 1: Introduction 1

Chapter 2: Installing the Connector 2

Chapter 3: Prerequisites 3

3.1 Ivanti Automation 2018.1 3
3.2 Ivanti Service Manager 4
3.3 Other 4

Chapter 4: Detailed task description 5

4.1 Create Incident 5
4.2 Update Incident 7
4.3 User Incidents 8
4.4 Details 9
4.5 Close 9
4.6 Run Query 10
4.7 Add attachment to incident 11
4.8 Get Incident attachment 11
4.9 Add Journal Entry 12
4.10 Add Email Entry 12

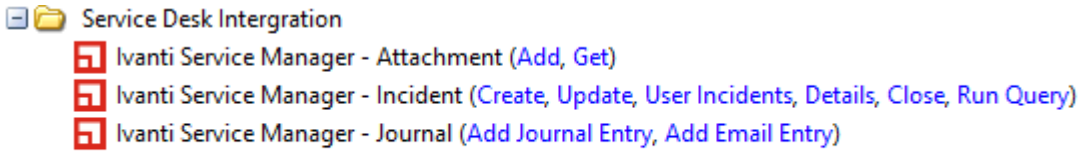
Chapter 5: More information 13

Copyright © RES Software Development B.V. All rights reserved.

Chapter 1: Introduction

The Ivanti Automation connector for Ivanti Service Manager provides tasks to allow the administrator to create and manage incidents from Automation. Create and leverage reusable modules in multiple Automation jobs. Utilize incident management tasks to create or update Service Manager incidents based on the results of other Automation tasks automatically or from a self-service portal such as Ivanti Identity director.

Use Service Manager tasks in runbooks to track and record results of previous tasks, for example a runbook contains tasks to update software. When the job is run the software installation fails on the target machine due to lack of free space. Automation can immediately create an incident with the failed devices information and assign the appropriate priority, urgency and team to investigate.



A working knowledge of Ivanti Automation & Service Manager is required. For more information on creating Ivanti Automation modules and runbooks refer to the Automation online help and Administration guides.

Copyright © RES Software Development B.V. All rights reserved.

Chapter 2: Installing the Connector

1. Download the connector from the Ivanti Marketplace. Use the filter on the left side of the Marketplace home page to narrow your search.

2. Download the Automation connector importer utility from here.

3. Launch the installer and follow connector installation steps.

4. Once installed open the Ivanti Automation console → Setup → Add-ons
   Confirm that Ivanti Automation Connector for Ivanti Service Manager is listed.

Copyright © RES Software Development B.V. All rights reserved.

Chapter 3: Prerequisites

To be able to use the Connector for Ivanti Service Manager the following is required:

3.1 Ivanti Automation 2018.1

Ivanti Automation Global Variables

The following global variable are required:

Name	Type	Notes
Ivanti Service Manager Tenant	text	Tenent url only. *tenenturl.com Note:* Do not include https://
Ivanti Service Manager UserName	text	User name to access Service manager via Automation tasks.
Ivanti Service Manager Password	password	Password of Ivanti Service Manager UserName
Ivanti Service Manager Role	text	Role of Ivanti Service Manager UserName

Copyright © Ivanti All rights reserved.

3.2 Ivanti Service Manager

Service Manager 2017.3

Proper user rights & API access on Service Manager console.

3.3 Other

Microsoft Windows PowerShell 3.0. You can download this version at:
http://www.microsoft.com/en-gb/download/details.aspx?id=34595.

Copyright © RES Software Development B.V. All rights reserved.

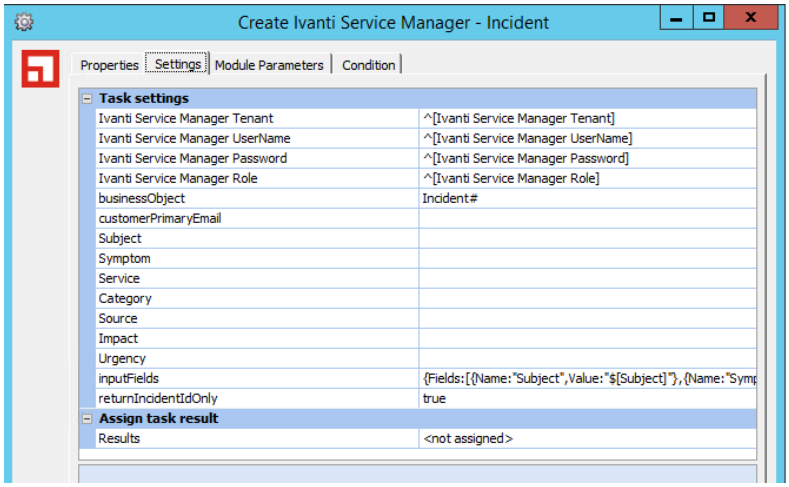
Chapter 4: Detailed task description

The following provides detail description and usage for each of the Automation tasks included in the connector.

Tip:

- Creating module parameters for the task allows you to reuse a module in multiple runbooks. This is very useful especially if you need to customize the default fields to fit your environment.
- Select the Module Parameters tab and “autocreate unused” module parameters this creates module parameters and associates the parameters with the task fields.

4.1 Create Incident



The create incident task creates a new incident for a user. The default task contains basic incident fields but may require modification to work properly in your environment by adding new module parameters and updating the parameter “inputFields”

Parameters:

- *customerPrimaryEmail* is a required field.
- Set *returnIncidentIDOnly* to false to return full incident details. The default is true and only the id of the new incident is returned.

Copyright © RES Software Development B.V. All rights reserved.

Modifying the input fields:

The input field is a series of name value pairs the format for each is the following:

Name:"<Service Manager Field Name",Value:"<Automation Module Parameter Name>"
Example: Name:"CustomerDepartment",Value:"$[AM_Parm_CustDept]"

To add the field CustomerDepartment to a module using the Create Incident task do the following:

1. Create a new Module parameter. This can have any name but should be close to the incident field name.
2. On the settings tab of the module add the incident field name and Automation parameter as a Name / Value pair. Note the format is important.

Default:

{Fields:[{Name:"Subject",Value:"$[Subject]"},{Name:"Symptom",Value:"$[Symptom]"},{Name:"Service",Value:"$[Service]"},{Name:"Category",Value:"$[category]"},{Name:"Source",Value:"$[Source]"},{Name:"Impact",Value:"$[Impact]"},{Name:"Urgency",Value:"$[Urgency]"}]}

Updated:

{Fields:[{Name:"CustomerDepartment",Value:"$[AM_Parm_CustDept]"},{Name:"Subject",Value:"$[Subject]"},{Name:"Symptom",Value:"$[Symptom]"},{Name:"Service",Value:"$[Service]"},{Name:"Category",Value:"$[category]"},{Name:"Source",Value:"$[Source]"},{Name:"Impact",Value:"$[Impact]"},{Name:"Urgency",Value:"$[Urgency]"}]}

3. Remove any default fields you either do not want to set or do not have in your environment.

Once the Create Incident module is properly configured for your environment it may be reused in multiple runbooks without modifications.
For valid values for each field go to the Ivanti Service Management Business Objects for field values.

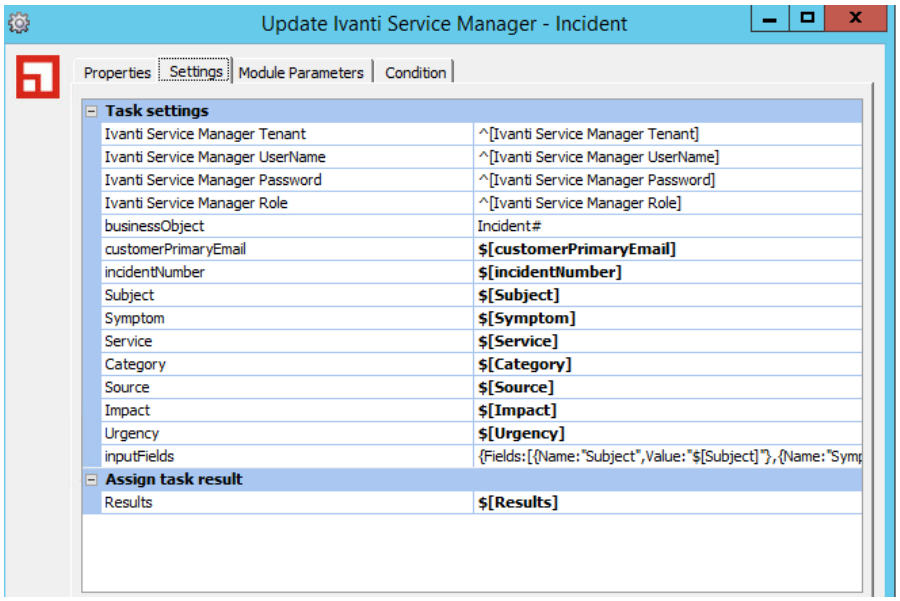
Tip: To see the fields configured in your environment create a module using the Incident details. This returns the full details to a specific incident opened by a user.

Return value:

- Full incident information or incident number. This is determined by changing the value of *returnIncidentIdOnly* settings.

Copyright © RES Software Development B.V. All rights reserved.

4.2 Update Incident



Update an existing incident for a user. This task is very similar to the create incident task and uses the same format for configuring additional fields.

Required fields are the primary user email and the incident number to update.

Use this task to update an incident within an runbook with the results of previous jobs.

Parameters:

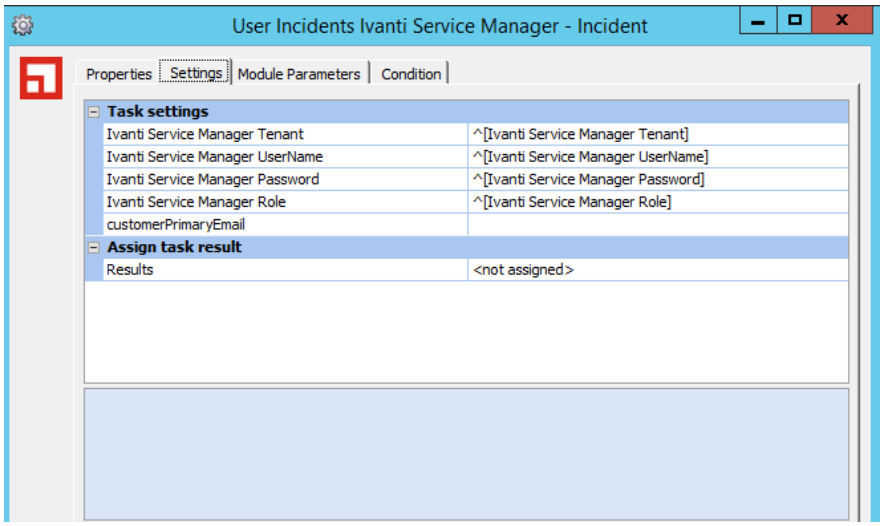
- *customerPrimaryEmail* and incident number are required fields.
- Automated delivery & return of Nutanix virtual machines during Employee Onboarding / Offboarding
- Refer to Create Incident task above to customize the *inputfield* parameter.
-

Return value:

- Full incident information

Copyright © RES Software Development B.V. All rights reserved.

4.3 User Incidents



Use this task to update an incident within an runbook with the results of previous jobs.

Parameters:

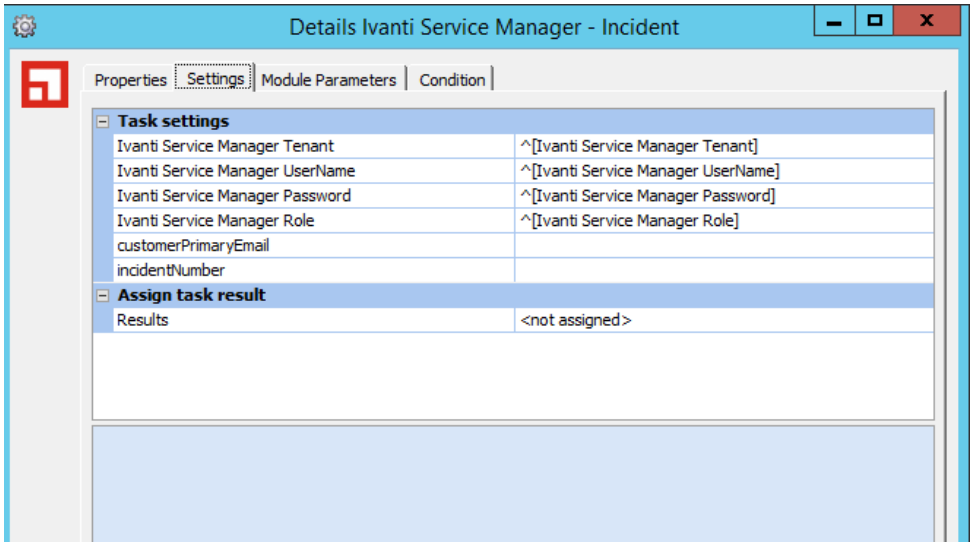
- *customerPrimaryEmail* and *incidentNumber* are required fields.

Return value:

- List of open incidents

Copyright © RES Software Development B.V. All rights reserved.

4.4 Details



Use this task to retrieve the full incident record.

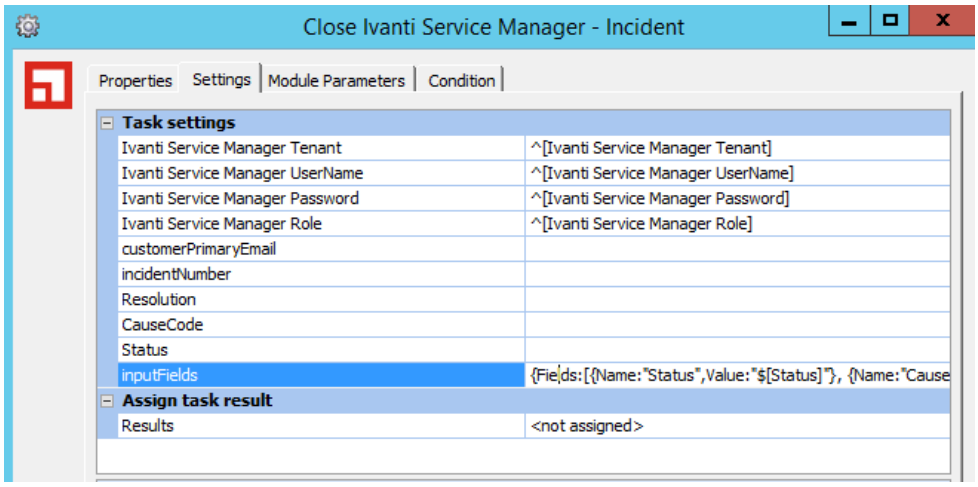
Parameters:

- *customerPrimaryEmail* and *incidentNumber* are required fields.

Return value:

- Full incident information

4.5 Close



Copyright © RES Software Development B.V. All rights reserved.

Close an open incident. Generic settings are predefined though you must verify these are correct for your environment. If additional fields are required or other need removing refer to section 4.1 above on modifying the *inputField* setting.

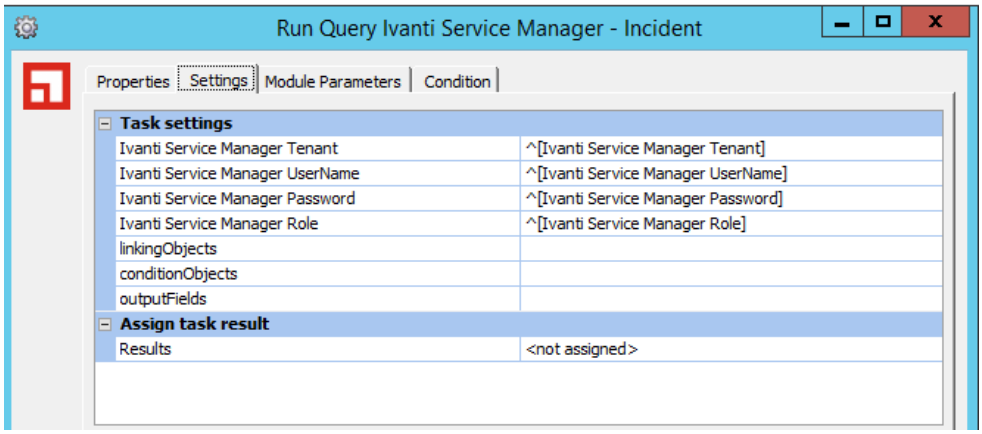
Parameters:

- *customerPrimaryEmail* and *incidentNumber* are required fields.
- *CauseCode* and *Resolution* may be required, confirm in your specific environment.

Return value:

- Full incident information.

4.6 Run Query



The run query task is for users with an advance knowledge of Service Manager and the Service Manager APIs. By combining the three parameters *linkingObjects, conditionObjects and outputFields* you can build a complex query. Refer to the Service Manager HEAT API documentation for more details.

Parameters:

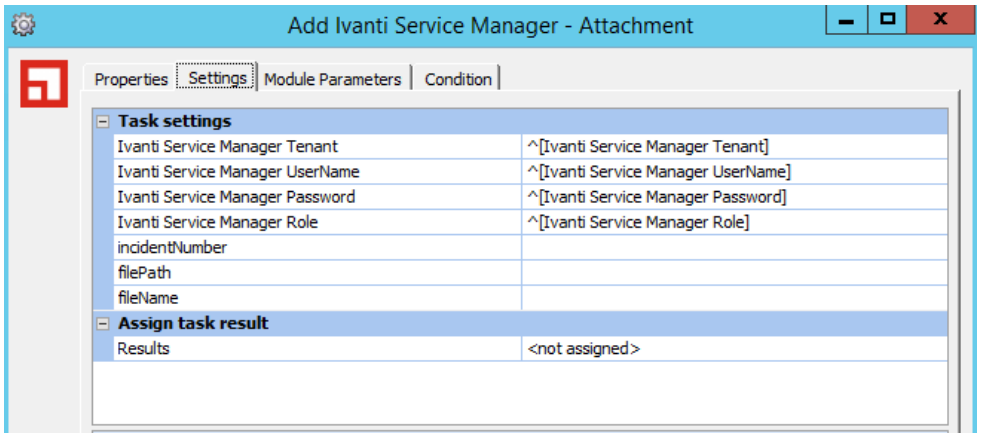
- *linkinObjects* example:
  {LinkingObjects:[{Name:"Frs_CompositeContract_Contact",Reference:"IncidentAssociatedCustomer"}]}
- *conditionObjects* example:
  {ConditionObjects:[{Join:"AND",Field:"Status",Condition:"=",Value:"Active"},{Join:"AND",Field:"Frs_CompositeContract_Contact.PrimaryEmail",Condition:"=",Value:"ACope@saasitdemo.com"}]}
- *outputFields:*
  {OutputFields:[{Name:"RecId"},{Name:"IncidentNumber"},{Name:"CreatedDateTime"},{Name:"Status"},{Name:"Symptom"},{Name:"Priority"},{Name:"Frs_CompositeContract_Contact.DisplayName"},{Name:"Frs_CompositeContract_Contact.PrimaryEmail"}]}

Return value:

- Query results in JSON format

Copyright © RES Software Development B.V. All rights reserved.

4.7 Add attachment to incident



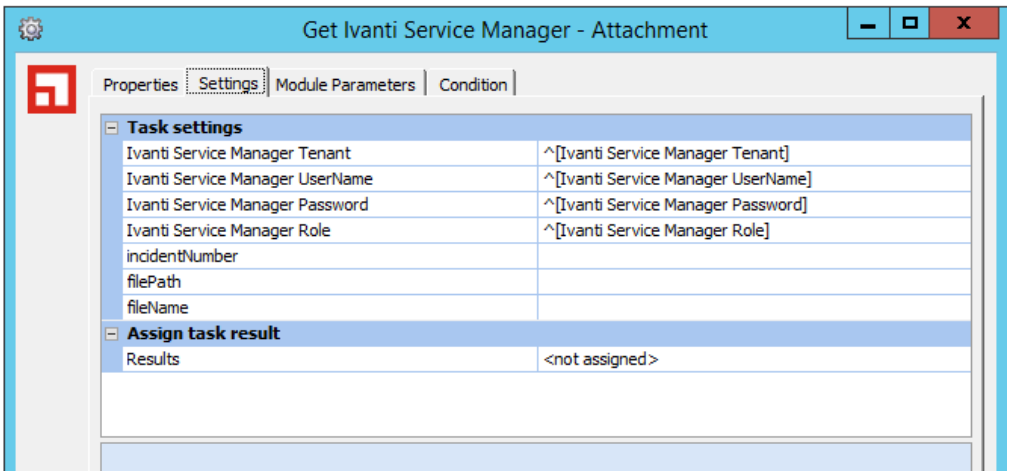
Add an attachment to an existing incident.

Parameters:

- *incidentNumber* is a required field
- *filePath* local path and file name of the file to attached to the incident
- *filename* resulting name of file after attaching to incident.

Return value:

4.8 Get Incident attachment



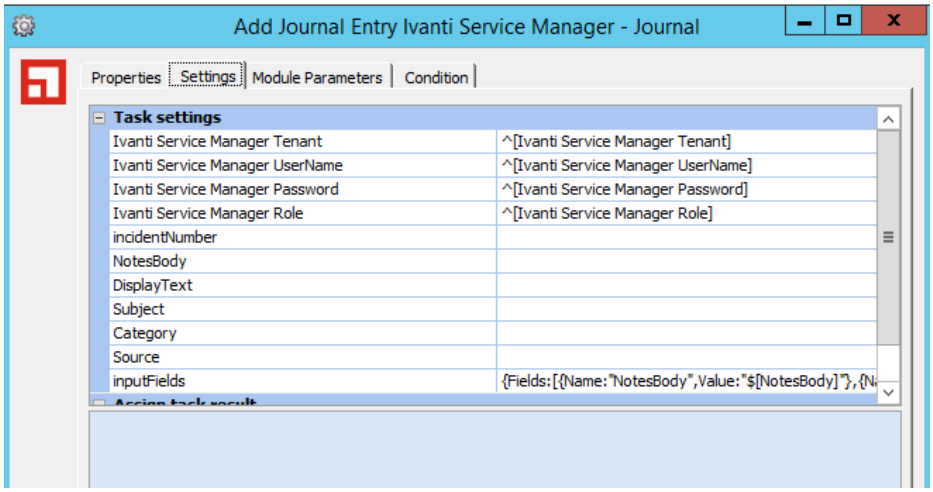
Retrieve an attachment from an existing incident.

Parameters:

- *incidentNumber* is a required field
- *filePath* local path and file name for downloaded file
- *filename* name of attachment in Service Manager.

Copyright © RES Software Development B.V. All rights reserved.

4.9 Add Journal Entry

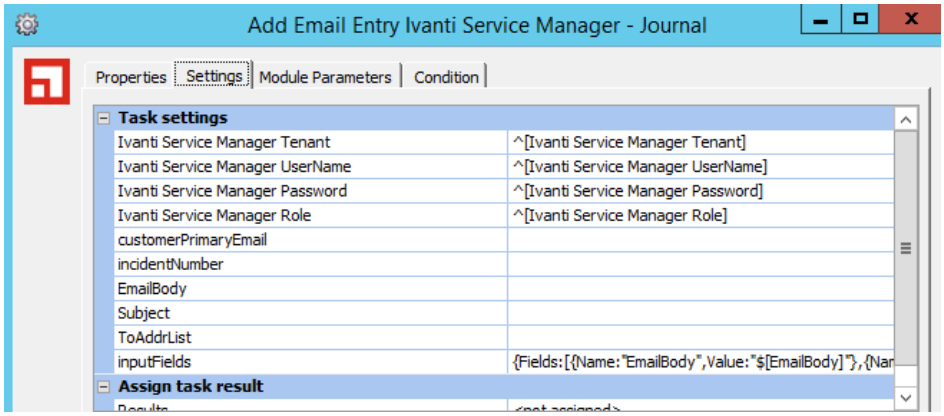


Add a journal entry to an existing incident.

Parameters:

- *incidentNumber* is a required field
- Additional parameters requirements must be confirmed in your environment.
- Adjust the inputFields entry as needed. See Create incident section above for details.

4.10 Add Email Entry



Add a email entry to an existing incident.

Parameters:

- *incidentNumber* is a required field
- Additional parameters requirements must be confirmed in your environment.
- Adjust the inputFields entry as needed. See Create incident section above for details.

Copyright © RES Software Development B.V. All rights reserved.

Chapter 5: More information

You can find more documentation at **https://www.ivanti.com/support/product-documentation**. Useful reading includes:

- **Ivanti Automation 2018.1 Administration Guide**:
- **Ivanti Service Manager Admin Online Help**.

Copyright © RES Software Development B.V. All rights reserved.