

## Ticket Sync Connector



Developed by “Ivanti as HEAT Software”

### Purpose:

The Ticket Sync Connector enables the Ivanti Service Manager administrator to integrate the various Defect trackers such as, VSTFS, JIRA, Mantis, etc. into Ivanti Service Manager.

Through the integration, the administrator can:

- Configure the Defect trackers.
- Create an incident in HEAT SM.
- Synchronize incidents as issues in the target Defect trackers.
- Synchronize comments and attachments.

### Interoperability / Compatibility:

This “Ticket Sync Connector” can be applied to the following Ivanti Products.

Ivanti Product: HEAT Service Management version: 2016.1+

Requirements for installed HEAT Modules/Add-ons: None

### Installation Instruction:

#### Prep Work:

It is recommended that you backup your HEAT database before you begin but this is not mandatory.

Backups can be done manually for on premise implementations. Ivanti Service Manager cloud customers can request a backup through the Ivanti Software Operations team.

#### Installation Process:

Please refer to the Section 3 *Installing the Ticket Sync Connector* in the *Ticket Sync User Manual*.

#### Configuration Instructions:

Once the package is imported, the administrator must configure the following:

1. Constants:
  - By default, the sample data is displayed after the package is imported.
  - Administrator should update the values according to the end user environment.

- Refer to the section 4.1 *Constants* in the *Ticket Sync User Manual*.
2. Ticket Sharing & Synchronization:
    - By default, the sample data is displayed after the package is imported.
    - Administrator should update the values for the following sections as per the requirements:
      - Credentials.
      - Filters.
      - Field Mapping.
      - Data Mapping.
      - Data Rules.
      - Additional Operations.
    - Refer to the section 4.2 *Ticket Sharing and Synchronization* in the *Ticket Sync User Manual*.

### How to verify proper implementation:

1. After package is imported:
  - In the Administrator section navigate to the **Settings > Monitor > Scheduled Jobs**.
  - Check for the Job named “Hourly Schedule” which is pre-configured to run every 1 hour.
2. Check that the following workspaces are displayed for users by clicking **More** in the menu:
  - Constants.
  - Connector Service.
  - Connector Service Transaction.
  - Ticket Sharing and Synchronization.
3. Navigate to **More > Connector Service Transaction** workspace:
  - In the top right above the grid, click **Action Menu > Connector**.
  - Check whether the following sub-menus related to the imported Ticket sync connectors are displayed:
    - Create Issue.
    - Sync Attachments Incoming.
    - Sync Attachments Outgoing.
    - Sync Comments Incoming.
    - Sync Comments Outgoing.
    - Sync Issue.
4. Check whether the administrator properly updated the configuration as described in the *Configuration Instructions* section.
5. From the HEAT Service Management, create an Incident per the configuration.
6. Navigate to **More > Connector Service Transaction** workspace:
  - A new transaction record should be displayed.
  - Check the **Service Unique ID** column.  
If there a value is displayed, then the Incident was created in the target Ticket sync connector.  
For example, VSTFS.
  - Access the VSTFS and check whether the incident is synced and a bug is created in VSTFS with the mapped fields and values.

- Edit the Incident in HEAT Service Management:
  - a. Add a comment.
  - b. Attach a file.
  - c. Click **Save**.
- Navigate to the transaction record under the Connector Service Transaction workspace:
  - Double-click the transaction record.
  - Click **Action Menu > Connector > TFS Sync Attachments Outgoing** to sync the attachments from HEAT to TFS.
  - Click the **Action Menu > Connector > TFS Sync Comments Outgoing** to sync the comments from HEAT to TFS.
  - Check the **Comment Transactions** tab.  
A new comment transaction record should be displayed.
  - Check the **Attachment Transactions** tab.  
A new attachment transaction record should be displayed.
- In the VSTFS, check the bug record. The notes and attachment should be synced successfully.
- In the VSTFS bug record:
  - Add a note.
  - Add an attachment.
  - Click **save**.
- Navigate to the **Transaction** record in the **Connector Service Transaction** workspace:
  - a. Double-click the transaction record.
  - b. Click the **Action Menu > Connector > TFS Sync Attachments Incoming** to sync the attachments from TFS to HEAT.
  - c. Click the **Action Menu > Connector > TFS Sync Comments Incoming** to sync the comments from TFS to HEAT.
  - d. Check the **Comment Transactions** tab.  
A new comment transaction record should be displayed.
  - e. Check the **Attachment Transactions** tab.  
A new attachment transaction record should be displayed.
- Check the Incident record in HEAT. The new note and attachment from VSTFS bug should be displayed.
- Edit the bug in VSTFS and change the status to **Closed**.
- Navigate to the transaction record under the **Connector Service Transaction** workspace:
  - a. Double-click the transaction record.
  - b. Click **Action Menu > Connector > TFS Sync Issue** to synchronize the status value to HEAT.
- Check the incident record for the status, the status should be updated to **Closed**.

## How to Use the APP (user manual):

Refer to the *Ticket Sync Connector Manual*.

## Troubleshooting tips:

Check the following steps:

- Ensure that the Ticket Sync package is deployed on the correct Ivanti Service Manager version.
- Check the **AppServer** log file in the server location C:\Logs.
- Check that the scheduled job is configured correctly in the administrator settings.
- Check that the credentials configured are valid for the connector service.
- Check that the connector service URL's are accessible.
- Check that the following items are configured correctly for the target service connector:
  - a. Filters.
  - b. Field Mapping.
  - c. Data Mapping.
  - d. Data Rules.
  - e. Additional Operations.

## Support:

The application is provided as an add on component to Ivanti Service Manager. Support for Ivanti Service Manager is provided by HEAT Software, Inc.

Support for third party Defect Management applications are provided by their respective vendors.

## Changes to the HEAT environment:

The Ticket Synchronization Framework will add several business objects and web service scripts:

- Business Objects (New). Will include appropriate forms, layouts, quick actions, etc. for these objects
  - frs\_data\_business\_object
  - frs\_data\_business\_object\_field
  - frs\_def\_comment\_business\_object
  - frs\_data\_constants
  - frs\_data\_connector\_service
  - frs\_data\_connector\_operation
  - frs\_def\_ticket\_sharing\_and\_synchronization
  - frs\_def\_connector\_service\_filter
  - frs\_def\_connector\_field\_mapping
  - frs\_def\_connector\_data\_mapping
  - frs\_def\_connector\_field\_constraint
  - frs\_def\_comment\_field\_mapping
  - frs\_def\_connector\_transaction
  - frs\_def\_comment\_transaction
  - frs\_def\_attachment\_transaction

- Hourly Schedule to poll for Ticket updates
- Web Service Scripts (one set per application)
  - Create Issue
  - Sync Issue
  - Sync Comments incoming
  - Sync Comments outgoing
  - Sync Attachments incoming
  - Sync Attachments outgoing
- Workflows
  - Sync workflow for each integration