

Create Ivanti business rules

Fluorine+

Business rules in Ivanti Service Manager will run specified scripts when certain events occur. To enable your Ivanti Service Manager data to be shared out, you will need to link your web service scripts to business rules.

Prerequisites


⚠ First, you will need to [create Ivanti integrations](#) and [create Ivanti web service script actions](#).

Procedure

To create Ivanti business rules, follow these steps:

1

Navigate to Business Rules

Log into Ivanti Service Manager and click the  in the upper right-hand corner of the screen to access your settings. Then, on the left-hand side **Settings** panel, navigate to **Business Objects** (under **Build**). On the resulting page, click the **Incident** table icon to access business objects for the incident table. Finally, in the upper right-hand corner of the resulting page, click **Business Rules**.

NOTE: This setup assumes you will sync data from your Ivanti incident table. To sync other data from Ivanti, contact [Perspectium Support](#) for a guided setup.

2

Add a business rule trigger

Expand the **Triggered Actions** list and click **Add Trigger**. In the resulting window, type **Perspectium Create Incident** for the **Trigger Name** and click the **On Insert** box next to **Object Event**.

Create Triggered Action

Trigger Name: **Type a trigger name**

Description:

SELECT AN EVENT THAT WILL TRIGGER THIS ACTION

Object Event: ☒ On Insert ☐ On Delete ☐ On Update **Check an object event**

Field Event: ☐ On Initialize ☐ On Update

Relationship Event: ☐ On Link ☐ On Unlink

CONDITIONAL EXPRESSION

In addition to the above criteria, the action will only trigger if the following expression is true:

☐ Disable Rule

<< Back **Next >>** Save Cancel

Click Next

3

Save your business rule trigger settings

Under **Action That Will Be Executed By This Trigger**, choose the **Use copy of existing action** option. Then, from the **Select Action** dropdown, choose **Perspectium Create Incident** to link your web service script to this business rule trigger. Finally, click **Save** in the bottom right-hand corner of the window to save your business rule trigger settings.

Create Triggered Action

Trigger Name:

Description:

ACTION THAT WILL BE EXECUTED BY THIS TRIGGER

New Action Type: ☐ Configure new action ☒ Use copy of existing action **Select this option**

Select Action: **Choose the appropriate action**

☐ Disable Rule

<< Back Next >> **Save** Cancel

Click Save

4

Create additional business rule triggers

Using **Steps #1-3** as a guide, create business rule triggers according to the table shown below.

Trigger Name	Object Event	Relationship Event	Relationship	Conditional Expression to add	Action that will be executed by this trigger
Perspectium Update Incident	On Update	N/A	N/A	\$(!IsNewRecord)	Perspectium Update Incident
Perspectium Create Attachment	On Insert	On Link	IncidentContainsAttachment	N/A	Perspectium Create Attachment
Perspectium Create Comment	On Insert	On Link	IncidentContainsJournal	N/A	Perspectium Create Comment

NOTE: The **Perspectium Create Attachment** and **Perspectium Create Comment** triggers will require a **Relation Event** and associated **Relationship** to be configured on the first **Create Triggered Action** window (in **Step #2**).

Next steps

[Create a custom Correlation ID field for Ivanti](#)

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Contact Perspectium Support



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