

# Create Ivanti business rules

**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:

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### Navigate to Business Rules

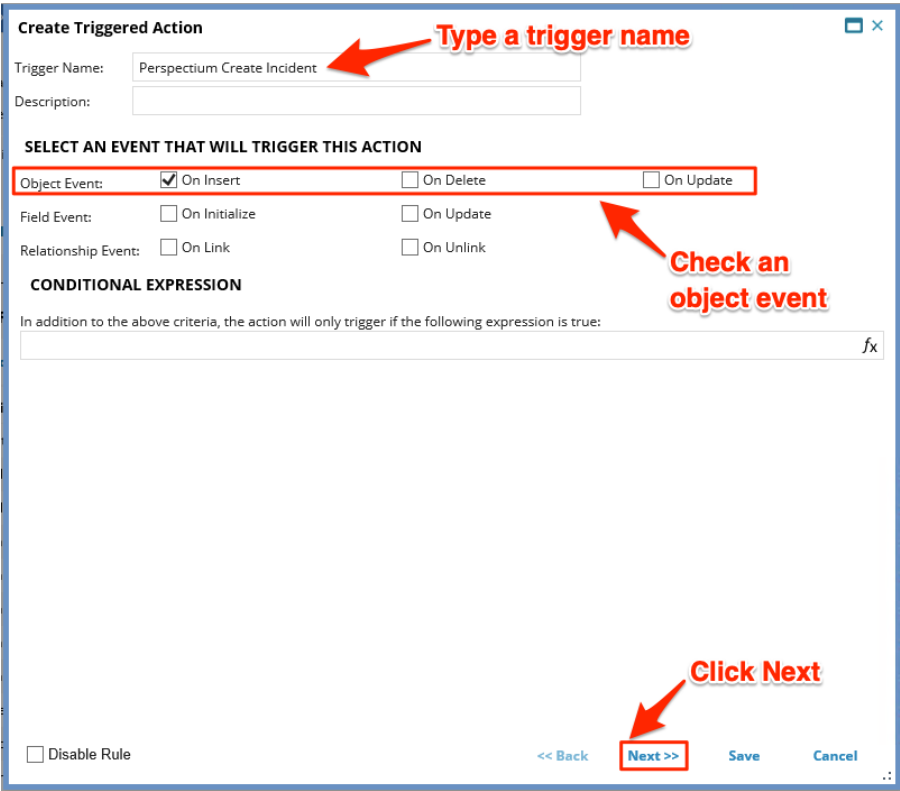
Log into Ivanti Service Manager and click the  in the upper right-hand corner of the screen to access your settings. Then, on the left-hand side **Settings** panel, navigate to **Business Objects** (under **Build**). On the resulting page, click the table you are integrating with to access business objects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

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### 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**.



The screenshot shows the 'Create Triggered Action' dialog box. It has a title bar with a close button. The 'Trigger Name' field contains 'Perspectium Create Incident'. The 'Description' field is empty. Below this is a section titled 'SELECT AN EVENT THAT WILL TRIGGER THIS ACTION'. It contains three rows of checkboxes: 'Object Event' with 'On Insert' checked, 'Field Event' with 'On Initialize' and 'On Update' unchecked, and 'Relationship Event' with 'On Link' and 'On Unlink' unchecked. Below this is a section titled 'CONDITIONAL EXPRESSION' with a text area and a formula icon. At the bottom left is a 'Disable Rule' checkbox. At the bottom right are '<< Back', 'Next >>', 'Save', and 'Cancel' buttons. Red annotations include: an arrow pointing to the 'Trigger Name' field with the text 'Type a trigger name'; an arrow pointing to the 'On Insert' checkbox with the text 'Check an object event'; and an arrow pointing to the 'Next >>' button with the text 'Click Next'.

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## 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 Action

☐ Disable Rule

<< Back   Next >>   **Save**   Cancel

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## Create additional business rule triggers

Using **Steps #1-3** as a guide, create business rule triggers according to the table shown below. This setup assumes you will sync data from your Ivanti **incident** table.

Table	Trigger Name	Object Event	Relationship Event	Relationship	Action that will be executed by this trigger
Incident	Perspectium Update Incident	On Update	N/A	N/A	Perspectium Update Incident
Attachment	Perspectium Create Incident Attachment	N/A	On Link	IncidentContainsAttachment	Perspectium Create Incident Attachment
Journal Notes	Perspectium Create Incident Comment	N/A	On Link	IncidentContainsJournal	Perspectium Create Incident Comment

To sync other tables data from Ivanti, follow the examples listed below.

Table	Trigger Name	Object Event	Relationship Event	Relationship	Action that will be executed by this trigger
Change	Perspectium Update Change	On Update	N/A	N/A	Perspectium Update Change
Attachment	Perspectium Create Change Attachment	N/A	On Link	ChangeContainsAttachment	Perspectium Create Change Attachment
Journal Notes	Perspectium Create Change Comment	N/A	On Link	ChangeContainsJournal	Perspectium Create Change Comment
Table	Trigger Name	Object Event	Relationship Event	Relationship	Action that will be executed by this trigger
Problem	Perspectium Update Problem	On Update	N/A	N/A	Perspectium Update Problem
Attachment	Perspectium Create Problem Attachment	On Insert	On Link	ProblemContainsAttachment	Perspectium Create Problem Attachment
Journal Notes	Perspectium Create Problem Comment	On Insert	On Link	ProblemContainsJournal	Perspectium Create Problem Comment

Table	Trigger Name	Object Event	Relationship Event	Relationship	Action that will be executed by this trigger
Service Request	Perspectium Update Service Request	On Update	N/A	N/A	Perspectium Update Service Request
Attachment	Perspectium Create Service Request Attachment	N/A	On Link	ServiceReqContainsAttachment	Perspectium Create Service Request Attachment
Journal Notes	Perspectium Create Service Request Comment	N/A	On Link	ServiceReqContainsJournal	Perspectium Create Service Request Comment
Table	Trigger Name	Object Event	Relationship Event	Relationship	Action that will be executed by this trigger
Task	Perspectium Update Task	On Update	N/A	N/A	Perspectium Update Task
Attachment	Perspectium Create Task Attachment	N/A	On Link	AssignmentContainsAttachment	Perspectium Create Task Attachment
Journal Notes	Perspectium Create Task Comment	N/A	On Link	JournalAssocTaskContainsJournal	Perspectium Create Task 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](#)