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Neurons iPaaS

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1. Overview

Ivanti Neurons iPaaS is a SaaS offering that enables Administrators to quickly and easily build integrations between Ivanti Neurons for ITSM/ITAM/Line of Business, and third-party applications.

Neurons for ITSM uses a no-code approach that leverages a library of hundreds of pre-built connectors where you can simply drag workflow blocks to build integrations.

The Neurons for ITSM integrations are powered by Workato which is an enterprise-grade integration platform that offers secure and scalable integrations which addresses costly, time-consuming, mundane, and code-intensive integrations. This helps increase IT productivity, experience, and improve agile practices by handling mundane tasks through automation.

For example, if your company uses Neurons for ITSM as the Service Desk application and the development team uses Jira, whenever an issue is raised in ITSM, a workflow can be automated to create an incident for it in Jira. Likewise, you can automate several workflows with various applications.

For more information, see **Workato Documentation**.

2. Key concepts

This topic explains some of the key Neurons for ITSM concepts that will help you understand how to build integrations.

> Check out **Workato Academy** for training. We encourage you to take up the Automation Pro Certificate training for a better understanding of theNeurons for ITSM offering. You can also refer to **Workato documentation** for more information.

Connector

A connector enables securing access to one or more instances of the business application. Each connector encapsulates the following:

- **Authentication Method** - the authentication method used to access third-party applications.
- **Triggers** - the conditions that trigger the integration workflow.
- **Actions** - the actions that are performed in the application.

Connection

Connection enables establishing a communication channel to a specific instance of an application, so that integration workflows can be executed for that instance. The information required to establish a connection is determined by the connector. Usually, it requires a URL to identify the instance and authentication information such as an API Key.

Connections can be in Connected or Disconnected Status.

Project

A project is a repository that stores recipes, connections, and sub-folders. It is helpful to organize projects by use case, department, process, or any other way that can be categorized and distinguished easily.

Recipe

A Recipe is the workflow design. It defines how the workflow is triggered and what actions are performed in the integrated application when triggered.

A Recipe can be in Active or Inactive Status.

Datapills

Datapills enable you to create custom workflows tailored to your business needs. The following datapills can be used in a recipe:

- Data from the application that is provided by the connector.
- Information from the Lookup Table.
- Project Properties.

3. Getting started

This topic helps you get started with IvantiNeurons for ITSM.

Enabling Neurons iPaaS

To enable theNeurons for ITSM offering in your environment, raise a service ticket to the Operations team. Once it is enabled, you can use the capability in Neurons for ITSMConfiguration console from the **iPaaS Integration** workspace.

Accessing the iPaaS Integration workspace

1. Log in to Neurons for ITSM as an Administrator.
2. Open the Configuration console.
3. Click **Extend** > **iPaaS Integration**.

   The **Projects** page is displayed.

   > If you do not have access to Neurons for ITSM, instead of the default **Projects** page, an error message will be displayed. To get access, raise a service ticket to the Operations team.

Exploring the iPaaS Integration workspace

The **iPaaS Integration** workspace has the following elements:

Projects

This is a repository that stores all the assets such as recipes and connections required for creating workflows and integrations. The **Projects** page has 2 sections:

- **Assets** - Displays a list of all Recipes and Connections. Recipes are organized categorically under **Active** and **Inactive** folders. Connections are organized categorically under **Connected** and **Disconnected**. The deleted ones are in **Trash**.
- **Projects** - Displays a list of all Projects. You can organize projects based on department, use case, or any other way as per your business needs.

Dashboard

Dashboard lets you visualize real-time data pertaining to the recipes and connections. You can get data such as the total number of successful jobs, failed jobs, tasks used, etc., which can be useful insights.

You can use filters such as **Period**, **Project**, **Recipe**, and **Service/App** to get the required data and insights.

Community Library

The Community Library is a fast and easy way to get a head-start on your integrations. Pre-built Recipes and Connectors are available here that are built by other developers. This allows you to immediately start building recipes by customizing them rather than building from scratch.

- **Recipes** - Pre-built Recipes are available here. Choose from the list or search using a keyword in the **Search** bar.
- **Custom connectors** - Pre-built Connectors are available here. Choose from the list or search using a keyword in the **Search** bar.

Ivanti Pre-built Recipes

Ivanti has published several pre-built recipes in the **Workato Community Library** under the label **Ivanti**. Workato licensed users can leverage these pre-built recipes by customizing them to suit their business needs.

Tools

- **Logs** - Audit logs of executed workflows are recorded and stored here, which can be used for troubleshooting issues.
- **Lookup Tables** - It is a reference table for mapping data when building Recipes. Data fields in different applications are referenced differently; this will help you with the right data when building workflows. For example, **the Summary** field in ITSM may be called **Description** in Jira; in such cases, Lookup Tables will help you pick and map the right data field.

4. Working with Projects

In the Projects workspace, you can create Projects, Recipes, Connections and Folders. You can also create Project Properties for constant values such as address, and connection URL, that can be reused across Recipes.

Creating a Project

1. Open the Configuration console > **Extend** > **iPaaS integration** > **Projects**.
2. From the **Projects** page, click **Create Project**.
3. Type a **Project Name** and **Description** (optional).
4. Click **Create Project**.

   The Project is created. The next step is to create a Folder.

   For more information, see **Workato Projects**.

Creating a Folder

1. Open a Project, click the **Create** dropdown button and select **Folder**.
2. Type a **Folder Name** and select the **Location** where the folder should be created.
3. Click **Create Folder**.

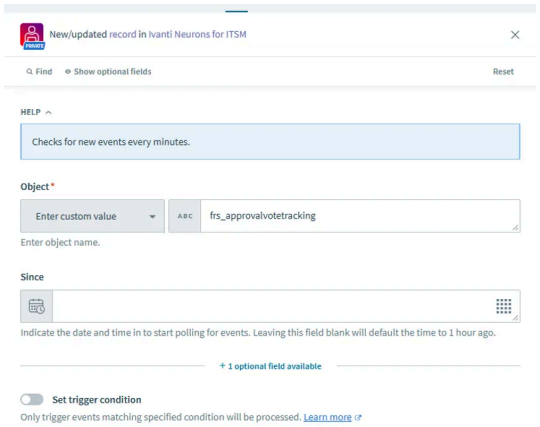
   The Folder is created. The next step is to create a Recipe.

Creating a Recipe

1. Open a Project, click the **Create** dropdown button and select **Recipe**.
2. Type a **Name** and set the **Location** where the Recipe should be saved.
3. Pick a **Starting Point**. Select an option based on your requirement. For example, select **Trigger from an App** to set the trigger based on an event in the app, or **Run on a Scheduler** to set the trigger at a scheduled time.
4. Click **Start Building**.

   The next step is to set the **Trigger** and **Actions** for the Recipe. For more information, see **Workato Recipe - Building a Recipe**.

5. When selecting a business object and using **Enter Custom Value**, enter the name using all lowercase letters. Business object names are case-sensitive. For example, business objects such as FRS_Knowledge, and FRS_CIComponent.Warranties enter it as frs_knowledge , and frs_knowledge, respectively.



Creating Project Properties

1. Open a Project and select the **Settings** tab.
2. Expand the **General** section and click **Project Properties**.
3. Enter the **Property Name** and **Value**.
4. Click **Save**.

5. Pre-built Recipes

Ivanti Neurons for ITSM provides the following pre-built recipes for you to get started with. You can customize these recipes or build your own recipe from scratch. You can also check out more recipes from the **Workato Community Library**.

JIRA - ITSM Integration Recipes

The following recipes are available out-of-the-box for integrations between JIRA and Neurons for ITSM.

- **ITSM - JIRA Task Sync** - When a new or existing task is created or updated in ITSM, the same is reflected in JIRA.
- **ITSM - JIRA Comment Sync** - When a comment is added or updated in ITSM to an Incident or Task, the same is reflected in JIRA.
- **ITSM - JIRA Integration** - When an incident is created or updated in ITSM, an issue is created or updated in JIRA.
- **JIRA - ITSM Integration** - When an issue or task is created or updated in JIRA, an incident or task is created in ITSM.
- **JIRA - ITSM Comments Sync** - When comments are added or updated in JIRA to an Issue, the same is reflected in the respective incident or task in ITSM.

ADO - ITSM Integration Recipes

The following recipes are available out-of-the-box for integrations between Azure Dev Ops (ADO) and Neurons for ITSM.

- **ADO - ITSM New Epic Sync** - When an epic is created in ADO, a change is created in ITSM.
- **ADO - ITSM New Feature Sync** - When a new feature is created in ADO, a change is created in ITSM.
- **ADO - ITSM Updated Feature Sync** - When a feature is updated in ADO, the respective change is updated in ITSM.
- **ADO - ITSM Updated Epic Sync** - When an epic is updated in ADO, the related change is updated in ITSM.
- **ADO - ITSM Sync Work Item New Bug** - When a new bug is created in ADO, an incident is created in ITSM.
- **ADO - ITSM Sync Work Item Updated Bug** - When an existing bug is updated in ADO, the related incident is updated in ITSM.
- **ITSM - ADO Sync Incident Bug** - When an incident is created or updated in ITSM, a bug is created or updated in ADO.

Salesforce - ITSM Integration Recipes

The following recipes are available out-of-the-box for integrations between Salesforce and Neurons for ITSM.

- **Salesforce - ITSM Case Tasks Synchronization** - When a task is created or updated in Salesforce, a task of the related incident is created or updated in ITSM.
- **ITSM - Salesforce Integration** - When an incident is created or updated in ITSM, a case is created or the related case is updated in Salesforce.
- **ITSM - Salesforce Comment Sync** - When a journal entry is created or updated in ITSM, a comment is added/updated to the related case in Salesforce.
- **ITSM - Salesforce Task Sync** - When a task is created or updated in ITSM, a task is created or updated for the related case in Salesforce.
- **Salesforce - ITSM Integration** - When a case is created or updated in Salesforce, an incident is created or related incident is updated in ITSM.
- **Salesforce - ITSM Case Comments Synchronization** - When a comment is created or updated in Salesforce, a journal entry is created or updated in the related incident in ITSM.

GitHub - ITSM Integration Recipes

The following recipes are available out-of-the-box for integrations between GitHub and Neurons for ITSM.

- **GitHub - ITSM Sync on Issue Create** - When an issue is created in GitHub, an incident is created in ITSM.
- **GitHub - ITSM Sync on Issue Closed** - When an issue is closed in GitHub, the respective incident is closed in ITSM.
- **GitHub - ITSM Sync Update Comment** - When a comment is entered/updated in GitHub, the respective journal entry is created/updated in ITSM.
- **GitHub - ITSM Sync on Issue Escalate** - When a Priority 1 and High Urgency Incident is created in ITSM, a job is created in GitHub.

> For the job to be created in the right repository, the repository details should be listed in the Lookup Tables. For more information, refer to **Add repository details**.

Workday- ITSM Integration Recipes

The following recipe is available out-of-the-box for integration between Workday and Neurons for ITSM.

- **Workday - ITSM Integration** - When an employee record is created/updated in Workday, a new employee record is created or existing employee record is updated in ITSM.

Jenkins - ITSM Integration Recipes

The following recipe is available out-of-the-box for integration between Jenkins and Neurons for ITSM.

- **Jenkins - ITSM Integration** - When a new build is triggered in Jenkins, a Change is created in ITSM. All the artefacts from the Jenkins build in pulled into the ITSM Change **Description** field.

6. Recipe Lifecycle Management

Recipe Lifecycle Management lets you plan, test, and then deploy your integrations for a seamless experience. It also enables teams to collaborate and contribute to recipe development.

The process of Recipe Lifecycle Management involves moving recipes as packages from a development/testing environment to a production environment, which enables moving only tested and stable recipes for integration into production. Packages can be imported and exported, which contain recipes, lookup tables, templates, and more.

Recipe Lifecycle Management Process

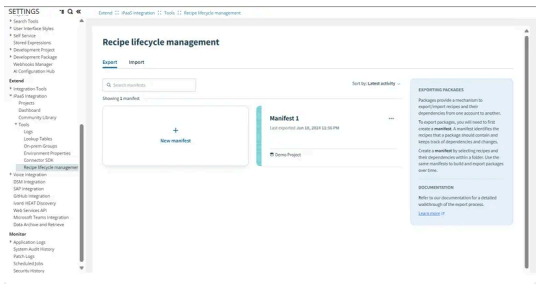
1. **Export** - Create a Manifest ⟶ Choose the Asset to include in the Manifest ⟶ Export the Package.
2. **Import** - Import Package ⟶ Review Package ⟶ select or clear Assets, Projects, Lookup tables to be included ⟶ Complete the import.

Export a Package

1. Log in to Neurons for ITSM as an Administrator.
2. Open the Configuration console, select **Tools** > **Recipe Lifecycle Management** > **Export**.
3. Select **New Manifest**.
4. Enter required details in the wizard.
5. Click **Next** > **Create a Manifest**.

   The Manifest is created, which can be exported as a package.
6. Click **Build and export package**.

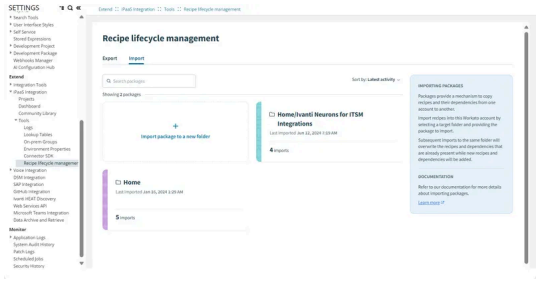
   The package is downloaded on your local device in a zip format.



Import a Package

1. From the Configuration console, select **Tools** > **Recipe Lifecycle Management** > **Import**.
2. Select **Import package to a new folder**.
3. Import the zip file.
4. Review the package content - select or clear the assets, projects, connections, and lookup tables to be included in the import.
5. Import the package.

   The package is successfully imported.


SETTINGS
Recipe lifecycle management
Export
Import
Import package to a new folder
Home/Ivanti Neurons for ITSM Integrations
4 imports
Home
5 imports

7. On-prem Agent

With Neurons for ITSM On-prem Agent, you can securely connect to authorized on-premise applications and databases that are hosted within private IT environment behind firewalls to ITSM cloud without compromising the security of on-premise systems.

> The On-prem Agent feature is licensed separately, to avail the license and/or know more, reach out to Ivanti Support.

Setting up On-prem - workflow

Create a group > Add an Agent (Select OS > Download and install agent > Activate the agent > Test the agent) > Add Connections.

On-prem Groups

With On-prem Groups, you can logically group multiple agents into a common connection pool. For instance, if you have a development environment with multiple applications and databases such as SQL, Jira, and Salesforce, you can pool them in a group to achieve High Availability. For more information on the advantages of On-prem groups and High Availability, see **Workato On-prem Group**.

Create a Group

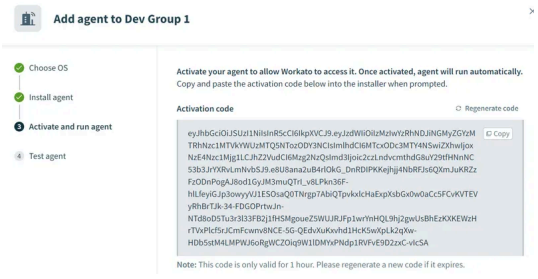
1. Log in to Neurons for ITSM as an Administrator.
2. Open the Configuration console, select **Tools** > **On-prem Groups** > **New Group**.
3. Enter a Group Name, select **Set up connections** as **Directly in Workato**.

> It is recommended to select **Directly in Workato** rather than **Manually in each agent**.

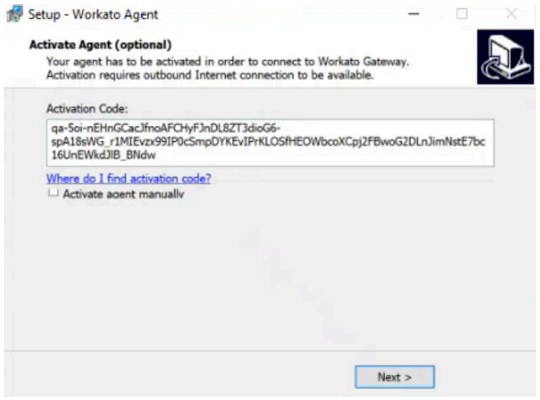
A group is created. The next step is to add an agent to each server. If you have three servers in the group, you must add agents to all three servers.

Add Agent

1. Click **Add On-prem Agent**.
2. Provide necessary details in the **Choose OS** section.
3. Download the installer.
4. When the download is complete, open the **.exe** file and install the agent.
5. While it is getting installed, click **Next** on the **Add Agent** page and copy the **Activation code**.



6. Enter the Activation code when prompted after the installation is complete.



7. Final step is to test the agent.

   A success message is displayed when the agent is successfully tested.

8. Repeat the process to add agents to all the servers.

Add Connections

Once the group is created and the agent is set up, the next step is to add connections to the agents. For more information, see **Connection**.

> To add a connection, go to **Projects** and add. Do not add from within the On-prem Group.

8. Limitations

Not all concepts or features available in Workato is available in Neurons for ITSM. You will notice that some of the hyperlinks displayed in the iPaaS feature in ITSM Configuration console do not work which could be due to the following limitations:

- IvantiNeurons for ITSM does not include **Workato's API platform.**
- IvantiNeurons for ITSM does not support **Audit Log Streaming**.
- IvantiNeurons for ITSM does not include Workato **FileStorage** or **SQL Transformation.**
- IvantiNeurons for ITSM does not support recipe concurrency beyond 5.
- IvantiNeurons for ITSM does not use or support Workato's **user and role management concept**. Only ITSM Administrators can access the capability to create, manage and monitor integration flows (recipes), therefore, it is irrelevant to use an additional user management and role concept.

9. Troubleshooting

Error message - "App refused to connect".

If you receive the above error when rendering the connection <iframe>, it is usually because your browser security settings do not allow third-party cookies. Configure your browser to enable cookie access in a third-party context.

- **Google Chrome:** Enable all cookies. Google Chrome blocks third-party cookies in Incognito mode by default. Enable third-party cookies in Incognito mode by going to **Settings** > **Privacy and security** > **General settings** and select **Allow all cookies**.
- **Apple Safari:** Disable **prevent cross-site tracking** in **Preferences** > **Privacy**.

10. Add repository details

Repository details is required when ITSM-GitHub integration is set, and you want the issue/job in the GitHub repository to be created through the recipe.

If an incident is escalated in ITSM, a job is created in GitHub. The repository jobs should be created depending on the details set up in the **Lookup Tables** and the repository name used in the **Summary** of the incident.

For example, if the incident should trigger a job in **the Dev** repository in GitHub, and the incident is about emails not working, then the **Summary** of the incident should be - Dev_Emails not working. The **Dev_** in the **Summary** is what created the job in the **Dev** repository in GitHub.

Adding repository details in Lookup Tables:

1. Log in to Neurons for ITSM as an Administrator.
2. Open the Configuration console.
3. Select **Extend** > **iPaaS Integration** > **Tools** > **LookupTables**.
4. Click **New Table**.
5. Select either **Import CSV** to import details through a CSV file or **Add entries manually** to add details manually.
6. If adding manually, give a contextual name for the repo in the first column and the repository details in the second column.
7. Save and exit once done.