INTEGRATION TEMPLATE

WORKING WITH WEBHOOKS AND WEBMETHODS

FLEXIBLE SOFTWARE. FOCUSED SERVICE.

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TABLE OF CONTENTS

1 DOCUMENT CONTROL

DOCUMENT NAME	
Brief description:	
Document Author:	
Process Owner:	
Process Sponsor:	
Next review date:	

2 DOCUMENT REVISION HISTORY

VERSION	DATE	CHANGED BY	CHANGES
0.1			

3 VIVANTIO INTEGRATION TEMPLATE

This document offers an overview of how a {describe required integration} between Vivantio ITSM and the {Customer integration platform} *(the external system)* will work.

The following operations will take place between the two systems

DATA BEING SENT FROM VIVANTIO - WEBHOOKS

DATA TO BE SENT	RECEIVING SYSTEM ACTION	INITIATED BY
e.g. Ticket ID, Title, Description	Create a ticket with the same title and description	

DATA BEING RECEIVED BY VIVANTIO - WEBMETHODS

External application name:

☐ External application has the ability to create custom web hooks and webmethods

☐ Customer able to create web hooks and web methods in external system

DATA RECEIVED	VIVANTIO ACTION	INITIATED BY
e.g. Ticket ID, Title, Description	Create a ticket with the same title and description	

1.1 WHAT DATA SHOULD BE SENT

Some integration scenarios only require a minimal set of data to be sent – for example, the Title/Description from the Ticket, and the details of the caller (name, email, etc). More complicated scenarios might also require priority, category, status, etc to be included.
In most cases we are advocates of keeping it to a minimal set of fields – introducing other fields may cause problems with field mappings (for example, if categories or priorities from the external system don't match those in Vivantio or vice-versa).

1.2 WHEN DATA SHOULD BE SENT

The two basic scenarios here are:

- Data is sent automatically using a rules-based approach

- Data is sent manually by intervention of an agent

Both are possible; the choice depends on your business processes. To illustrate with two examples:

Automatic / Rules-based

All tickets of a certain category are dealt with by the third party, you might configure rules in Vivantio similar to: When a new ticket is created with category = 'XXX', create a ticket in the third-party system. When a ticket in the category 'XXX' is updated, update the corresponding ticket in the third-party system, etc.

Manual Intervention

In some cases, it's not possible to automatically determine if a ticket should be sent to a third party – an agent has to decide. In this scenario, no rules are required; the agent can manually invoke the Webhook as required.

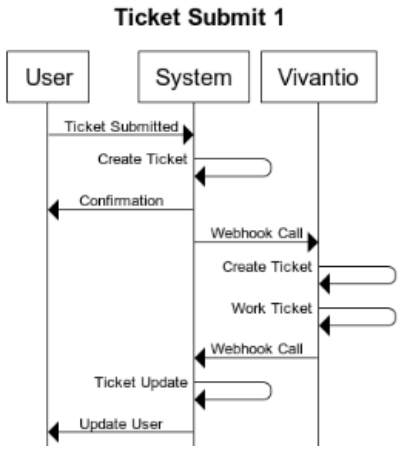
1.3 AUTHENTICATION METHOD

There are three ways that external systems can authenticate to Vivatnio.

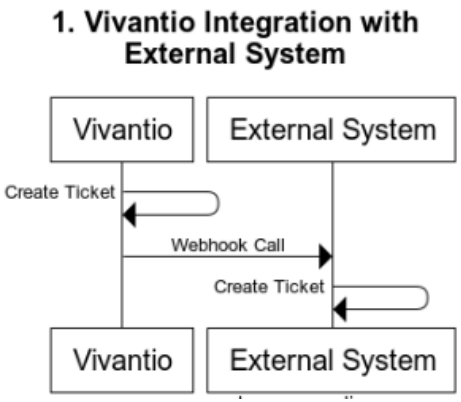
Use API login – great for internal integrations as its secure and in normal circumstances the password will not expire.
Use a dedicated named license – great for secure external integrations but passwords will need regular updates based on your security settings.
Access Key Auth allows anonymous authorisation over the web via an access key, restrict the IP address range to increase security.

If you are using a named license Vivantio recommend setting up a profile with minimal system access, your implementation consultant can advise you on this.

Each operation is described within this standard template:

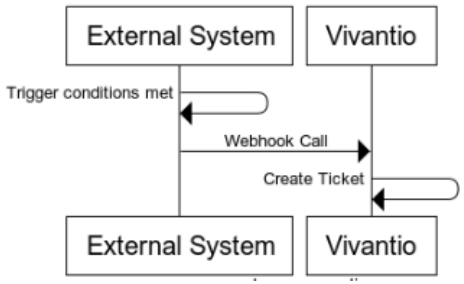
OPERATION NAME: EXAMPLE				
Operation Direction: the direction of the call from the perspective of the Vivantio system; an outgoing integration call is a Webhook; an incoming integration call invokes a Web Method				
Description:				
SUMMARY	**INITIATING EVENT**	**CONTENTS**	**ACTIONS** INCLUDING ACTION CONDITIONS AND ONGOING TRIGGERS	**RESPONSE**
Integration summarised in a sequencing diagram.  	The circumstances when the integration call is made	The fields that will be contained in the integration call	What the recipient system will do when it receives a successful integration call	What response, if any, the recipient system will give once it has received and actioned a successful integration call

4 WEB HOOK DETAILS (SENDING DATA FROM VIVANTIO)

OPERATION NAME: EXAMPLE – SENDING TICKET DATA TO A SECOND SYSTEM				
Operation Direction: From Vivantio to External system - Webhook	**Description**: Send a ticket to external system			
	Request url: https://			
SUMMARY	**INITIATING EVENT**	**CONTENTS**	**ACTIONS** INCLUDING ACTION CONDITIONS AND ONGOING TRIGGERS	**RESPONSE**
Integration summarised in a sequencing diagram. 	Trigger rule or manual conditions (webhook will only be available when conditions are met).	Request body details including content type	What the recipient system will do when it receives a successful integration call	What response, if any, the recipient system will give once it has received and actioned a successful integration call

5 WEB METHOD DETAILS (SENDING DATA TO VIVANTIO)

OPERATION NAME: EXAMPLE – SENDING TICKET DATA TO A SECOND SYSTEM	
Operation Direction: From External System to Vivantio – Webmethod	**Description**: Create a ticket from details sent from external system
	Request url: https://

SUMMARY	INITIATING EVENT	ACTIONS INCLUDING ACTION CONDITIONS AND ONGOING TRIGGERS	RESPONSE
5. Vivantio Integration with External System  	Webhook integration call (further details on conditions in actions)	What the recipient system will do when it receives a successful integration call	What response, if any, the Vivantio will give once it has received and actioned a successful integration call

6 APPENDIX A – TEST REQUEST BODIES

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