



***sassafras***

# TeamDynamix Integration Set-up Instructions v2.0

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Set aside approximately 60 minutes to walk through the steps outlined below. Most of the work is done in TeamDynamix, but a few steps near the end are performed using the "Sync with TeamDynamix" script in the AllSight web interface (or KeyConfigure). Make sure you test in your TD sandbox before syncing with your production TD instance.

## Verify Compatibility

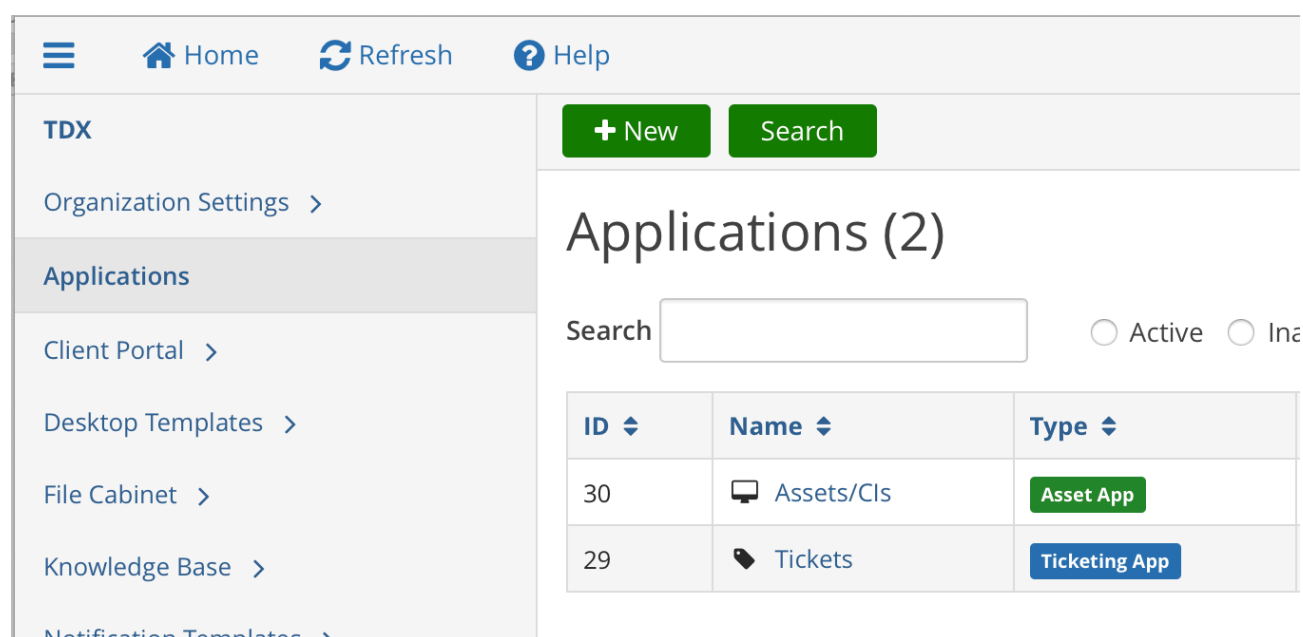
AllSight/KeyServer 7.7 is a minimum requirement, but we recommend updating to AllSight version 7.8.0.0 or higher for best results. The steps in this guide were tested with TeamDynamix 11.2. (Note that some of the options will require the latest version of the script itself. If you have previously installed it, you may need to update the script in Settings > Scripts in the AllSight web interface).

## Gather Pre-Requisites

1. Determine the base URL of your TeamDynamix instance.  
(e.g. <https://myinstance.teamdynamix.com>)
2. Determine an appropriate Name and Password for a new TeamDynamix user record (to be created and assigned minimal permissions for integration in a later step).

## TeamDynamix Prep

1. Log into TeamDynamix as Admin.
2. From the Home page, click **Applications**.

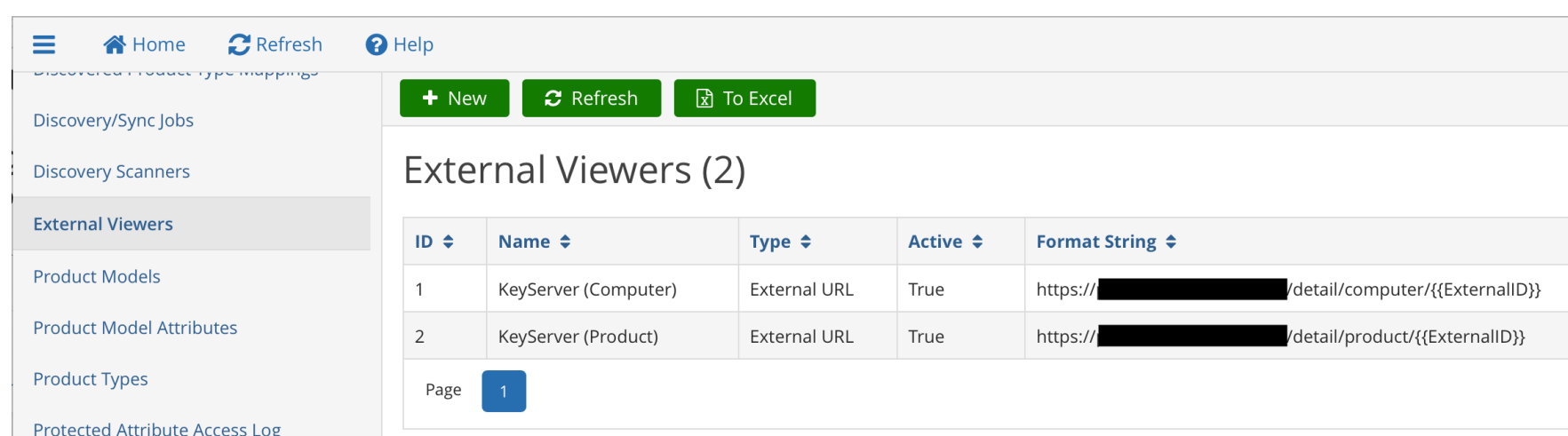


3. Decide which Application will contain AllSight data (must be an "Asset App" like **Assets/Cls**).
4. Record the ID of the Application (e.g., number 30 in the image above for "**Assets/Cls**").
5. Click on the chosen Application to open its page.

## Set Up External Viewers

This section is optional, but demonstrates how to create links at the top of each TD computer and/or product record that take users to the associated record in the Sassafras AllSight web interface.

1. Scroll to and click "**External Viewers**" on the left.
2. Create two new external viewers as shown, using your AllSight web address:



3. Record the IDs of the new external viewers (they might not be 1 and 2).

4. Define Security Roles for a new TD integration "user" account.

A. Define a global security role (**TDAdmin > Users and Roles > Security Roles**):

- License type: **Enterprise**
- Security permissions: **None**

B. In the Asset Application you're using with the Sassafras integration, define a security role (**TDAdmin > Applications > [Asset Application] > Security Roles**):

- License Type: **Enterprise**
- Select security permissions as in the image to the right.

5. In TDAdmin, create a new user (**TDAdmin > Users & Roles > Users > + Create > Create User**). Enter the required fields:

A. Username

B. Security Role – Choose the role defined above

C. First Name - e.g. "AllSight"

D. Last Name - e.g. "Sync"

E. Auth Provider – TeamDynamix

F. Password & Confirm Password

G. Primary Email and Alert/Notification Email

## Edit Security Role

### General

Name \*

Asset Integration

License Type

Enterprise

Select All

Clear All

Select Defaults

### Permissions

#### Asset

- Add Global Searches and Global Report Folders in Assets/CIs
- Create and modify contracts for assets
- Create and modify product types/product models of assets
- Create and modify vendors of assets
- Create assets and configuration items
- Create duplicate assets from within the TDNext Assets/CIs application
- Delete assets in the TDNext Assets/CIs application
- Import assets
- Modify assets and configuration items
- Update assets

#### Configuration Item

- Import configuration items

#### Configuration Management

- Create and modify maintenance windows
- Delete maintenance windows

6. **Save.** We recommend using "AllSight Sync" as the "user name," so it will be clear which data has come from this integration, but you can use anything you like.

7. On the Applications tab of the user, grant them access to the **Asset Application** using the **Asset Integration** security role defined above.

## Create "Attributes" for additional AllSight Computer and Product fields

A small number of fields, such as Computer Name and Serial Number, will be brought in from AllSight automatically after connecting with TeamDynamix. Additional hardware and software details must be imported into manually created TeamDynamix fields. These steps demonstrate how to create and manage these new fields.

### New Asset Attribute

#### General

Attribute Name \*

KS: Disk Size

Header Text \* ?

Disk Size

Attribute Type \*

Text Box

Data Type \*

Integer

Sort Order \*

0



Description/Help

1. For **Computer** fields, select Asset Attributes in the left side column, and click "**+New**" to add each new Computer Field (one at a time).

The screenshot shows the 'Asset Attributes (13)' management page. The left sidebar contains a navigation menu with 'Asset Attributes' selected. The main content area features a search bar, filter buttons for 'Active', 'Inactive', 'Both', 'Root-Level', and 'Dependent', and a table of attributes.

ID	Order	Attribute	Parent	Type	Active	Updatable
1714	0	KS: Address		textarea	True	False
1712	0	KS: Client Version		textbox	True	False
1720	0	KS: CPU Description		textbox	True	False
1730	0	KS: CPU Speed		textbox	True	False
1727	0	KS: Disk Free		textbox	True	False
1728	0	KS: Disk Size		textbox	True	False
1713	0	KS: Division		textbox	True	False
1738	0	KS: Last Login		datefield	True	False
1715	0	KS: MAC Address		textbox	True	False
1710	0	KS: OS Family		textbox	True	False
1735	0	KS: OS Install Date		datefield	True	False
1726	0	KS: RAM Size		textbox	True	False
1736	0	KS: User Name		textbox	True	False

2. Names of the new attributes should begin with "KS: " and they should match the column names from the **KSComputers** and **KSProducts** tables (with spaces added in between words). If you want to add specific properties beyond what is documented here, contact Sassafras Support.

**NOTE:** For date fields, you can choose between Date/Time Picker (if you want to see the exact time) or just a Date Picker. All other fields should have an Attribute Type of "**Text Box**" and Data Type of "**Text**".

3. Recommended Computer attributes are:

- KS: Address
- KS: Client Version
- KS: CPU Description

- KS: CPU Speed (this will include the number of cores which sometimes is not part of the description)
- KS: Disk Free (integer)
- KS: Disk Size (integer)
- KS: Division
- KS: Last Login (date)
- KS: MAC Address
- KS: OS Family
- KS: OS Install Date (date)
- KS: RAM Size
- KS: User Name
- KS: Model (optional)\*

\*TeamDynamix has a built-in Model field, which may already be populated with your own model names. If you do not want AllSight to overwrite your Model entries, you can use the **KS: Model** attribute above to add a new AllSight/KeyServer-specific model field that will auto-populate with Model data discovered on the hardware by the KeyAccess client. If you have not previously created model entries in TeamDynamix, or if you want AllSight to overwrite your entries, there is no need to create the new KS: Model attribute here. Using AllSight to populate the TD Model attribute will be discussed later in this guide.

4. To import software audit data from AllSight, you will need to create fields to hold the product data (**Configuration Items** or **CIs**). A "relationship" will then be established between Computer Assets and the Software Products installed on them. Begin by selecting "**Configuration Item Attributes**" in the left side column, and then click the "**+ New**" button for each new field:

5. Recommended attributes for Products are:

- KS: Category
- KS: Contact Address
- KS: Description (text area)
- KS: Publisher
- KS: Release Date (date)

The screenshot shows the AllSight web application interface. The top navigation bar includes Home, Refresh, and Help. The left sidebar lists various application settings, with 'Configuration Item Attributes' selected. The main content area displays a table of Configuration Item Attributes (5) with columns for ID, Order, Attribute, Parent, Type, Active, and Protected. The table lists five attributes: KS: Category, KS: Contact Address, KS: Description, KS: Publisher, and KS: Release Date. A search bar and filter options (Active, Inactive, Both, Root-Level, Depender) are visible above the table.

ID	Order	Attribute	Parent	Type	Active	Protected
1762	0	KS: Category		textbox	True	False
1763	0	KS: Contact Address		textbox	True	False
1764	0	KS: Description		textarea	True	False
1765	0	KS: Publisher		textbox	True	False
1766	0	KS: Release Date		datefield	True	False

## Enable the TeamDynamix Integration in the AllSight web app

1. Log into AllSight's web interface and head to Settings > Scripts, then check the box next to the **"Sync with TeamDynamix"** script to install it. Click the gear icon to enter the Settings dialog (image on the next page).
2. Enter the parameters you gathered in the Pre-Requisites step on page 2.
3. If you already have computer records in TeamDynamix and want to add AllSight data to them, select Serial Number, Asset ID,

The screenshot shows the 'Sync with TeamDynamix' settings dialog. It has tabs for General, Matching, and Options. The Matching tab is active, showing fields for Instance URL, Admin, Password, AppID, Computer Viewer ID, and Product Viewer ID. The Instance URL is https://partner1.teamdynamix.com, Admin is keyserver, AppID is 35, Computer Viewer ID is 5, and Product Viewer ID is 6. There are Save and Cancel buttons at the bottom right.



and/or Name (Computer Name) from the dropdown menu for computer matching; the checkboxes should generally be ignored. In most cases, **Serial Number** is the most reliable unique identifier to match against (as long as pre-existing TD records have Serial Numbers recorded.)

Generally, whether you have existing records in TD or not, we recommend setting "Unique value in TDX" to "Serial Number". The three toggles for "Match by" are only used if you select "Best Match" from the drop down menu.

If you don't have serial numbers in TD yet, you can match against **Computer Name** instead. If no match is found, a new Computer "Asset" will be created in TD (unless you select the "Don't Create New Assets in TD" option).

If you simply want TD to mirror Computer records from AllSight exactly, use **External ID** (which will map to the AllSight ComputerID).

Unique Value in TDX:

Serial Number ▾

Match by Serial Number

Match by Asset ID

Match by Name

4. Decide whether to include "**Dormant**" AllSight Computer records in the import.

5. As previously mentioned, you may have already populated the TeamDynamix Asset "Model" field with entries of your own. If you don't want AllSight to overwrite your entries, DO NOT check the "Set Computer Model from KeyServer" option. If you want to keep your previous Model entries and import AllSight-discovered model data into a new field, create the **KS: Model** field as described in the previous section.

6. "**Include Software Audit Relationships**"

determines whether Software Audit data

will be imported into TD. With this option turned off, only hardware data is synced.

Process Computers in:

All Sections ▾

Don't Create New Assets in TD

Include Dormant Computers

Set Computer Model from KeyServer

Set Lifecycle Stage from KeyServer

Set Purchase Date from KeyServer

Set Warranty Date from KeyServer

Use Deployed as default Status

Include Software Audit Relationships

Sync with Sandbox Instance

Full Product Sync

Write to Log

7. **“Sync with Sandbox”** determines whether you are syncing with your TD test environment or production. With this option on, production syncing is off.
8. **“Full Product Sync”** should always be OFF, unless you have deleted previously synced products and need them back.

## Automatic Data Integration

In addition to data imports from AllSight Computer and Product fields as described above, some additional data is recorded in TeamDynamix for respective objects automatically:

- A Configuration Item Type named **“Software Product”** is created.
- A Configuration Item Relationship Type named **“Installed on”** is created.
- Product Types named **“Desktop Computer”**, **“Laptop Computer”**, and **“Virtual Computer”** are created as needed.
- Asset Statuses are created as needed.
- Vendors and Product Models will be added as needed (for computer/asset entries).
- Computers will be added to the Assets list.
- Products will be added to the Configuration Items list.
- Relationships between Assets (computers) and CIs (products) will be added according to audit info.

## Data that will be updated in AllSight

The Sync with TeamDynamix script primarily pushes AllSight/KeyServer data into TeamDynamix - however, some Computer values will get updated in AllSight if they are modified in TeamDynamix. This works on the assumption that TeamDynamix is where you will want to manage certain details, such as: when a computer is moved, assigned to a new user, or changes status.

The values that will be updated in AllSight are:

TeamDynamix Attribute	AllSight Field
Service Tag	Asset ID
Owning Acct/Dept	Department
Location	Location
Owner	Owner*
Serial Number	OEM Serial Number
Status	Lifecycle Stage (if used)

\* Except for Owner, all of the values above can be pushed both directions. The **Owner** field is never populated in TeamDynamix from AllSight data.

If AllSight is creating a Computer Record/Asset for the first time in TeamDynamix, and AllSight has a value (for one of the fields in the image above), that value will be populated in TeamDynamix. If the Asset already exists in TeamDynamix, the current value in TeamDynamix will update the AllSight property. In other words, TeamDynamix becomes the source of data for these fields (except Owner, as explained above).

## Daily Sync Scheduling

Once you have tested the script manually in KeyConfigure, you can schedule it to update data every 24 hours on the Settings > Scripts page in the AllSight web interface, by clicking the clock icon next to the TeamDynamix script and defining a sync schedule.

⌚ Sync with TeamDynamix... ✕

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Certain scripts can be scheduled to run periodically on the server. All required options must be entered in the default settings in order for the script to run successfully.

Run next at:

2021-06-05	06:08:00
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Run every:

24	hours
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Remove
Save
Cancel

That's the last step in the data integration process. If you have any questions, comments, or requests for bug fixes and/or feature enhancements, please let us know at [support@sassafras.com](mailto:support@sassafras.com), or give us a call at 603-643-3351.