



# **Team**Dynamix

## **Integration Set-up**

### Instructions v3.0

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# TD Integration Set Up Instructions v3.0

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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 admin console.

**Make sure you test in your TD sandbox before syncing with production.**

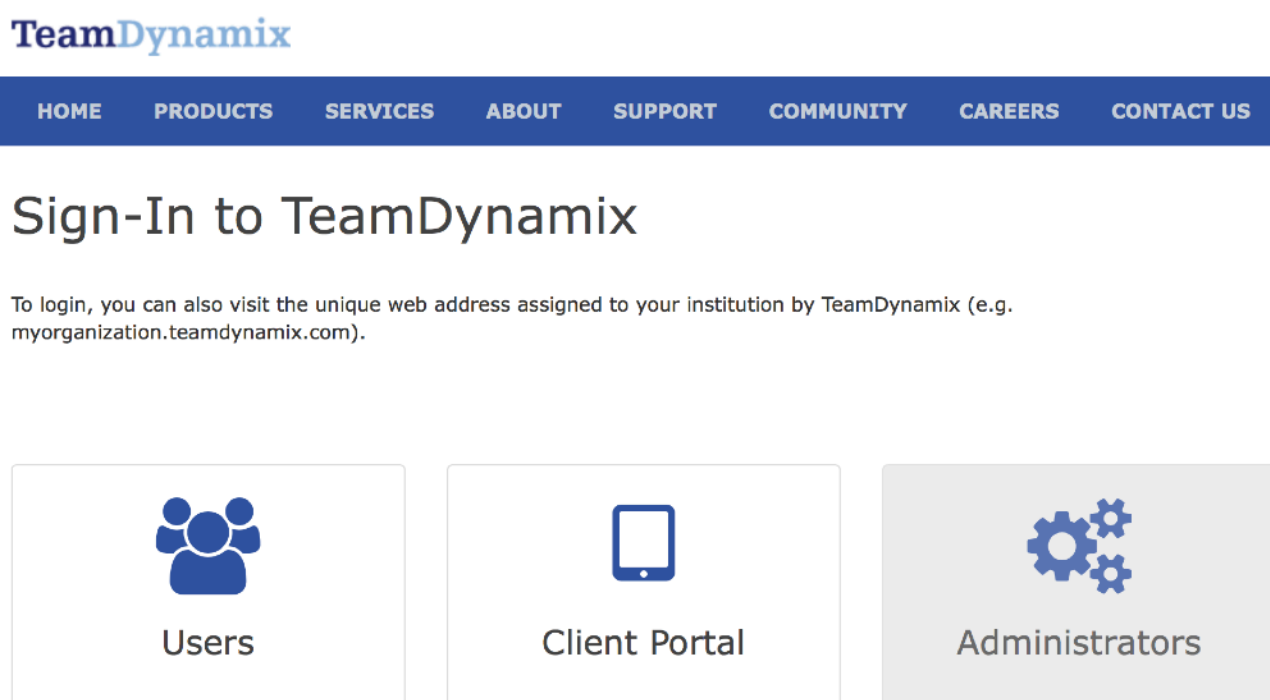
## Verify Compatibility

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 11.4. 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 Prerequisites

1. Determine the base URL of your TeamDynamix instance.  
(e.g. [https://www.\[myinstance\].teamdynamix.com](https://www.[myinstance].teamdynamix.com))
2. Determine an appropriate Name and Password for a new TeamDynamix user record (to be created and assigned minimal permissions for the integration in a later step).
3. Ensure that traffic initiated from the KeyServer host computer can reach the TeamDynamix instance on port 443 (i.e. generally that outbound traffic is not blocked).

**NOTE:** All of the following steps in TD will be in the Administrator UI (TDAdmin), NOT in the end user facing UI (TDNext).



## Create a User Account for the Integration

1. Define a global security role for a new TD integration user account (**TDAdmin > Users and Roles > Security Roles**):

- Name: **AllSight Integration**
- License type: **Enterprise**
- Security permissions: **None**

2. In TDAdmin, create a new user (**TDAdmin > Users & Roles > Users > + Create > Create User**). Enter a user name on the first screen. We recommend using "**AllSight Sync**" so it will be clear which data has come from this integration, but you can use anything you like. On the next screen, enter the required fields:

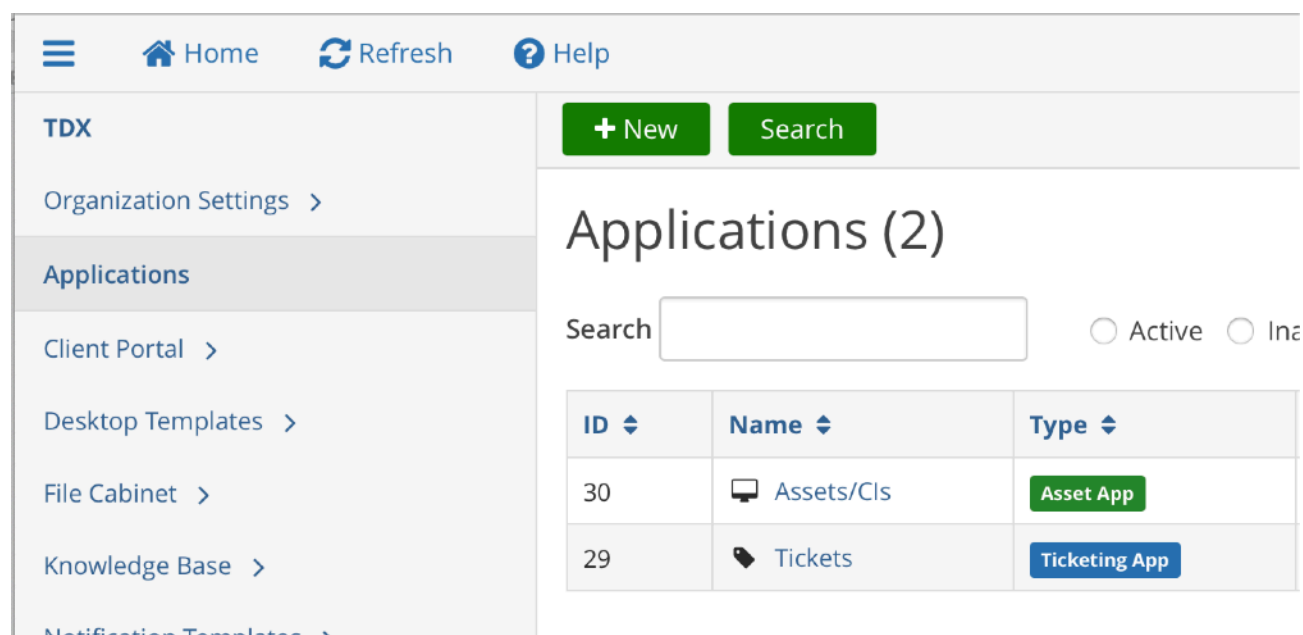
- Security Role - Choose the global security role defined above ("**AllSight Integration**")
- First Name - e.g. **AllSight**
- Last Name - e.g. **Sync**
- Auth Provider - **TeamDynamix**

- Password & Confirm Password
- Primary Email and Alert/Notification Email

3. **Save.**

## Configure Permissions Within Asset Application

1. From the TDAdmin Home page, click **Applications**.



2. Choose an Application to sync AllSight data to (must be an "Asset App" like **Assets/CIs**).
3. Record the **ID** of the Application (e.g., number 30 in the image above for "Assets/CIs").
4. Click on the chosen Application to access its configuration options.
5. Define an application security role, choosing a distinct name from the global role created above (**TDAdmin > Applications > [Asset Application] > Security Roles**):

- Name: **Asset Integration**
- License Type: **Enterprise**
- Select security permissions as in the image below:

## 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. Within the Application, head to **Users & Roles / Users** and click **"Add"**. In the dialog, first choose the user account created for the integration (**AllSight Sync**), and the application security role created in the last step. Finally, we recommend turning on the checkbox to **"Add as Application Administrator(s),"** which is required to allow the integration script to create lifecycle statuses in TD. **Save**.

## 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 are imported into manually created TeamDynamix fields. These steps demonstrate how to create and manage these new fields.

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

Asset Attributes (13)

Search  ☐ Active ☐ Inactive ☒ Both ☐ Root-Level ☐ Dependent

ID	Order	Attribute	Parent	Type	Active	Updatable
1714	0	KS: Address		textbox	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. The names of the new attributes should begin with “KS: ” and match the column names from the **KSComputers** and **KSProducts** tables (with spaces added 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**” (except **Disk Free** and **Disk Size**, which have the “integer” data type).

## New Asset Attribute

### General

Attribute Name \*

KS: Disk Size

Header Text \* ?

Disk Size

Attribute Type \*

Text Box

Data Type \*

Integer

Sort Order \*

0

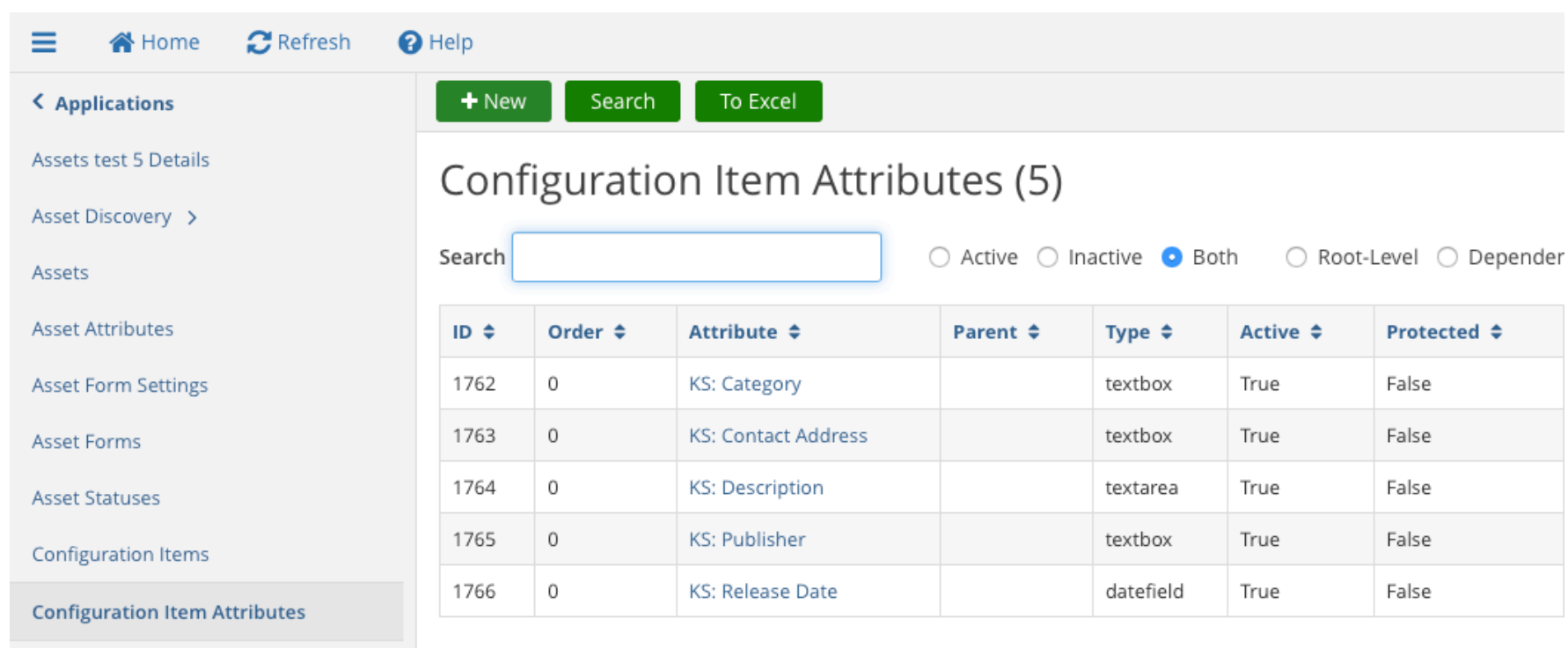
Description/Help

### 3. Recommended Computer attributes are:

- KS: Address
- KS: Client Version
- KS: CPU Description
- KS: CPU Speed (includes number of cores, which is not always in 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 assets have a built-in Model reference, which may already be populated with your own model names. If you do not want AllSight to change the model that assets are linked to, you can use the **KS: Model** attribute above to add a new AllSight/KeyServer 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 create new model records, 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 Configuration Item (CI) attributes to hold the product data. 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 attribute:
5. Recommended attributes for Products are:
  - KS: Category
  - KS: Contact Address (Software Publisher URL)
  - KS: Description (Text Area)
  - KS: Publisher
  - KS: Release Date (Date)



The screenshot shows the 'Configuration Item Attributes (5)' page. The left sidebar contains a navigation menu with 'Configuration Item Attributes' selected. The main content area has a search bar and filters for Active, Inactive, Both, Root-Level, and Depender. Below the filters is a table of attributes.

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

## 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.



ID	Name	Type	Active	Format String
1	KeyServer (Computer)	External URL	True	https://[REDACTED]/detail/computer/{{ExternalID}}
2	KeyServer (Product)	External URL	True	https://[REDACTED]/detail/product/{{ExternalID}}

2. Create two new external viewers as shown above, using your AllSight web address.

Examples:

https://www.[SampleDomain].com/detail/computer/{{ExternalID}}

https://www.[SampleDomain].com/detail/product/{{ExternalID}}

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

## 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 gathered in the **Prerequisites** step on Page 2 above.
3. Click on the **Matching** tab. In most cases, selecting **Serial Number** from the drop-down is the most reliable way to match AllSight Records against TD records (as long as pre-existing TD records have Serial Numbers recorded.) Generally, whether you have existing records in TD or not, we recommend setting the "Unique value in TDX" option to "**Serial Number**". In this case, you do not need to enable any of the three toggles below the drop-down.

If you don't have serial numbers in TD yet,

General

Matching

Options

Instance URL:

https://partner1.teamdynamix.com

Admin:

keyserver

Password:

.....

ApplID:

35

Computer Viewer ID:

5

Product Viewer ID:

6

Save

Cancel

Unique Value in TDX:

Serial Number

Match by Serial Number

Match by Asset ID

Match by Name

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). The three toggles for **"Match by"** are only used if you select **"Best Match"** from the drop down menu.

4. Decide whether to include **"Dormant"**

AllSight Computer records in the import. If your AllSight instance is fairly new, you may want to turn this option ON to make sure all of your computer records are synced into TD. If your AllSight instance contains a lot of dormant records for retired machines, you'll likely want to keep this setting OFF.

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 also import AllSight-discovered model names into a new field, create the **KS: Model** field as described on **Page 7** above.

6. When ON, **"Use Deployed as Default Status"** will create a new asset status option in TD called **"Deployed"**, matching the default status in AllSight/KeyServer. With this setting OFF, new assets with an AllSight status of **"Deployed"** will adopt the TD default status **"In Use."** (Creating new statuses requires making the user account an application administrator.)

7. **"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

8. **"Sync with Sandbox"** determines whether you are syncing with your TD test environment or production. With this option on, production syncing is off. **Make sure you test in your TD sandbox before syncing with production.**
9. **"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:

- Asset 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.

Additionally, if **"Include Software Audit Relationships"** is turned on:

- A Configuration Item Type named **"Software Product"** is created.
- A Configuration Item Relationship Type named **"Installed on"** is created.
- **Products** will be added to the Configuration Items list.
- **Relationships** between Assets (computers) and CIs (products) will be added according to audit info.

## Data 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 updated in AllSight will be:

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 and run the script manually, 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.

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**.

⌚ Sync with TeamDynamix...
×

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:

Run every:

Remove
Save
Cancel