

Kelverion Integration Module for Cherwell Service Management

Version 1.0

Release Notes

Updated: January 2020

Introduction

The Kelverion Integration Module for Cherwell Service Management is a new Integration Module for Runbook Studio and Azure Automation that lets you integrate your runbooks with Cherwell Service Management. The integration module includes the following activities:

Activity	Description
Add-CherwellAttachmentContent	Uploads an attachment on a record
Get-CherwellAttachmentContent	Download an attachments content.
Get-CherwellAttachmentInfo	Get attachment info on a record.
Get-CherwellRecord	Get a record.
New-CherwellRecord	Create a new record.
Remove-CherwellRecord	Remove a record.
Set-CherwellRecord	Update an existing record.

System Requirements

The Integration Module for Cherwell Service Management requires the following software to be installed and configured prior to implementing the integration. For more information on installing Kelverion Runbook Studio, please refer to the Kelverion Runbook Studio User Guide.

- Kelverion Runbook Studio 3.4
- Microsoft .NET Framework 4.7.2
- Cherwell Service Management 9.6.3 or 9.7

The Integration Module for Cherwell supports Azure Automation and Service Management Automation (SMA) platforms:

- Azure Automation requirements:
 - Azure Automation account
 - Hybrid Worker Group with at least one Hybrid Worker

- SMA requirements:
 - System Center 2016 SMA
 - At least one Automation Worker

Installing the Integration Module from PowerShell Gallery

You can install the Integration module directly from the PowerShell Gallery to your Azure Automation Account and Hybrid Workers. If you want to build runbooks in Keverion Runbook Studio using the integration module you must also install it on your Runbook Studio host system.

To install the Integration Module for Runbook Studio:

1. Confirm you have the latest PowerShellGet module. See online documentation for more information: <https://www.powershellgallery.com/>
2. Start a PowerShell window as Administrator and run the command:
Install-Module -Name Keverion.Cherwell

To install the Integration Module in Azure Automation:

1. Go to the PowerShell Gallery URL:
<https://www.powershellgallery.com/packages/Keverion.Cherwell> and click **Keverion.Cherwell**
2. Click the button “**Deploy to Azure Automation**” and you will be redirected to the Microsoft Azure portal.
3. Select your Automation account and click **OK** to upload the module.

To install the Integration Module on a Hybrid Worker:

1. Confirm you have the latest PowerShellGet module on your Hybrid Worker computer. See online documentation for more information: <https://www.powershellgallery.com/>
2. Start a PowerShell window as Administrator and run the command:
Install-Module -Name Keverion.Cherwell

Installing the Integration Module Manually

After you download the integration module, you must upload it to your Portal and Worker hosts. If you want to build runbooks in Keverion Runbook Studio using the integration module you must also install it on your Runbook Studio host system.

To install the Integration Module for Runbook Studio:

1. Copy the **Kelverion.Cherwell.zip** to your computer.
2. Right click on the file and select properties. Unblock the file if it is blocked.
3. Unzip the **Kelverion.Cherwell.zip** file.
4. Copy the **Kelverion.Cherwell** folder to a location in the %PsModulePath% path.

To install the Integration Module in Azure Automation Portal:

1. Go to your automation account and select **Assets**.
2. In **Assets** select **Modules**.
3. In **Modules** select **Add a module**.
4. In **Upload File** field, select the **Kelverion.Cherwell.zip**.
5. Select **OK** to upload the module.

To install the Integration Module on a Hybrid Worker:

1. In the Kelverion Runbook Studio or Microsoft Azure portal:
 - a. Create an Runbook with the following PowerShell: **\$Env:PSModulePath**.
 - b. Test this runbook on the Hybrid Worker and record the output for use in Step 5.
2. Copy the **Kelverion.Cherwell.zip** to your Hybrid Worker computer.
3. Right click on the file and select properties. Unblock the file if it is blocked.
4. Unzip the **Kelverion.Cherwell.zip** file.
5. Copy the **Kelverion.Cherwell** folder to a location in the path returned in Step 1b.
Note: The Hybrid Worker uses its own unique value for %PSModulePath% and will differ from that of the system.

To install the Integration Module in SMA 2016:

1. Go to your Service Management Portal and select **Automation**.
2. In Automation select **Assets**, and then at the bottom select **Import Module**.
3. In the Import Integration Module dialog, select **Browse for file...** and select the **Kelverion.Cherwell.zip**.
4. Select the Complete **checkmark** to upload the module.

To install the Integration Module on an SMA Automation Worker:

1. In the Service Management Portal:
 - a. Create an Runbook with the following PowerShell: **\$Env:PSModulePath**.
 - b. Test this runbook on an Automation Worker and record the output for use in Step 5.
2. Copy the **Kelverion.Cherwell.zip** to your Automation Worker computer.
3. Right click on the file and select properties. Unblock the file if it is blocked.
4. Unzip the **Kelverion.Cherwell.zip** file.

5. Copy the **Kelverion.Cherwell** folder to a location in the path returned in Step 1b.

Note: The Automation Worker uses its own unique value for %PSModulePath%, and may differ from that of the system.

Licensing the Integration Module

Licenses for Kelverion Integration Modules are managed and deployed using Kelverion Runbook Studio.

Register an Integration Module license with Runbook Studio:

1. Open Kelverion Runbook Studio
2. In the **File** tab, click **About**.
3. Click **License Information**.
4. Click the **Integration Modules** tab.
5. Click **Add License**.
6. Select the integration module license file (*.kaml) and click **Open**.
7. You should see your entitlements displayed in the list.
8. Click **OK**.

License keys are distributed to Azure using connection assets. To Create a Connection Asset with a license key and upload it to Azure, do the following:

1. In the **Home** tab, click **Sign In**.
2. Select the Azure Automation Account that will contain the connection.
3. Click **New Asset** and click **Connection**.
4. In the **Name** field, enter a name to identify the connection.
5. In the **Connection Type** field, select the desired connection type.
6. Enter the appropriate connection information in the provided fields.
7. Click **OK**.

Known Issues and Limitations

1. When creating Problem records, you may not be able to specify values for Impact or Urgency, depending on how validation is configured for these fields in Cherwell Service Manager Administrator. With default configuration, the operation may fail with validation error "The value <specified value> in field Problem.Impact/Problem.Urgency is not valid". To work around this issue, you can update validation configuration for these fields and check the "On conflict use first match" option. For details on how to modify field validation settings, refer to Cherwell Service Manager Administrator documentation.

Changes History

Version 1.0

- Initial release.