



# INTEGRATION MODULE FOR CHERWELL SERVICE MANAGEMENT

*For Keverion Runbook Studio and Azure Automation*

## Release Notes

Version 1.4

October 2021

Microsoft  
Azure

Certified

# Introduction

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The **Kelverion Integration Module for Cherwell Service Management** is an 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:*

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

## System Requirements

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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 4.7
- Microsoft .NET Framework 4.7.2
- Cherwell Service Management 9.6.3, 9.7.0, 10.0.1, 10.1.2

## Installing the Integration Module

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The easiest way to install and deploy the Integration Module for Cherwell Service Management is from the PowerShell Gallery, but you can also download the module from Kelverion and perform the steps manually.

You must install and deploy the Integration Module to each Azure Automation Account and hybrid runbook worker host system that you plan to use to run your runbooks. You must also install the Integration Module on any Runbook Studio host systems that you will be using to build and manage your runbooks.

### Using the PowerShell Gallery

Using the commands in the **PowerShellGet** module you can download the Integration Module for Cherwell Service Management from the PowerShell Gallery and install it on your local computer. You can also deploy the module directly from the PowerShell Gallery to any of your Azure Automation Accounts.

*Install the integration module on your local computer or hybrid runbook worker:*

1. Confirm that you the PowerShellGet module is installed.
2. Start a PowerShell window as Administrator and run the command:

```
Install-Module -Name Keverion.Cherwell -Scope AllUsers
```

*Upload the integration module to an Azure Automation account:*

1. Go to the [PowerShell Gallery](#).
2. Click the **Azure Automation** tab.
3. Click **Deploy to Azure Automation**. You will be directed to Microsoft Azure.
4. Select the **Automation Account** that you want to deploy the module to.
5. Click **OK**.

## Manual Installation

Alternatively, you can download the Integration Module package from Keverion and deploy it manually to your local computer, hybrid runbook workers and Automation Accounts.

The download package from Keverion includes a **.zip** file containing the Integration Module as well as the User Guide and Release Notes. The following instructions assume that you have unzipped the download package and have access to the **.zip** file containing the Integration Module.

*Install the Integration Module on your local computer or hybrid runbook worker:*

1. Copy the **Keverion.Cherwell.zip** file to your local computer.
2. Right-click on the file and select **Properties**.
3. Click the **General** tab. If necessary, click **Unblock**, and then click **OK**.
4. Unzip the **Keverion.Cherwell.zip** file.
5. Copy the **Keverion.Cherwell** folder to a location in the `%PsModulePath%` path.

**Important:** When installing the Integration Module on a hybrid runbook worker, you must use a location that is accessible to all users of the computer.

*Upload the integration module to an Azure Automation account:*

1. Sign into [Microsoft Azure](#).
2. Open the Automation Account that you want to upload the module to.
3. Click **Modules** under Shared Resources. The list of installed modules is displayed.
4. Click **Add a module** at the top of the list.
5. In the **Upload File** box, select the **Keverion.Cherwell.zip** file that you downloaded.
6. Click **OK**. Importing the module may take several minutes.

# Licensing the Integration Module

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Licenses for Keverion Integration Modules are managed and deployed using the *Keverion Runbook Studio* and *Automation Connection Assets*.

## *Register an integration module license with Runbook Studio:*

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

**Important:** Entitlements will not display until after the Integration Module has been installed on the Runbook Studio computer.

## *Create a connection asset with a license key and upload it to Azure:*

1. On the **Home** tab, click **Sign In**. The Sign In dialog appears.
2. Sign into your account.
3. In the **Active Azure Automation Account** box, select the account that you want to add the connection asset to.
4. Click **New Asset** and then click **Connection**. The New Connection dialog appears.
5. In the **Name** field, enter a name to identify the connection.
6. In the **Connection Type** field, select the desired connection type.
7. Enter the appropriate connection information in the provided fields.
8. Click **OK**.

## *Update all connection assets license keys and upload them to Azure:*

1. On the **Home** tab, click **Sign In**. The Sign In dialog appears.
2. Sign into your account.
3. In the Explorer panel, click the **Azure (Online)** group.
4. Right-click the Azure Automation Account that contains the connection assets you want to update, and then and then click **Update License Keys**. A summary is displayed.

## Known Issues and Limitations

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- 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 select the **On conflict use first match**.

For details on how to modify field validation settings, refer to Cherwell Service Manager Administrator documentation.

- When retrieving records with **Get-CherwellRecord** we strongly recommend using the **Limit** and **Filter** parameters to control the size of the record set retrieved from the Cherwell server. Currently all records are retrieved from the sever in a single page, due to an API limitation, which can negatively affect system performance for large record sets.

## Version History

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### Version 1.4

- Extended filter support in **Get-CherwellRecord** activity. The activity now supports filtering for a much larger range of fields, for all supported objects. Several cases have been identified where the Cherwell search API does not filter records as expected; please refer to **Filters Issues and Limitations** section in the user guide for details.
- Added support for Cherwell Service Management 10.1.2

### Version 1.1

- **This version is not backwards compatible with previous versions** due to field changes in the connection type used by this module. For assistance with upgrading older versions of the integration module, please contact [Kolverion Support](#) for assistance.
- Implemented a fix in record retrieving functionality to address an issue with record paging in the Cherwell API.
- Introduced a new **TargetVersion** connection property and version specific configuration files to handle object and field differences between Cherwell Service Management versions.
- Introduced configuration functionality for filtering parameter browser values.
- Added support for Cherwell Service Management 10.0.1.
- Fixed several configuration issues affecting Cherwell Service Management 9.7.0.

## Version 1.0

- Initial release.