



RUNBOOK SURVEYOR

For Microsoft System Center Orchestrator

For System Center 2016 and 2019, you must use the 32-bit version of the surveyor, which has the name **KeverionRunBookSurveyorForSCOrch.exe**

For System Center 2022 and later, you must use the 64-bit version of the surveyor, which has the name **KeverionRunBookSurveyorForSCOrch64-bit.exe**

User Guide

Version 4.15

Kelverion Runbook Surveyor

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Feedback

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Getting Started

Introduction

The Runbook Surveyor provides the System Center Orchestrator user the ability to create visually rich diagrams and detailed documentation of their Orchestrator Runbooks.

System Requirements

The Runbook Surveyor requires the following software to be installed and configured prior to generation of documentation. For more information about installing and configuring Orchestrator and Microsoft Office products, refer to the respective product documentation.

- Microsoft System Center Orchestrator 2016 / 2019 (32-bit) or Microsoft System Center Orchestrator 2022 (64-bit)
- Microsoft Word 2019/2021
- Microsoft Visio 2019/2021
- Windows Server running a US English Operating System
- Measurement system set to U.S.
- Microsoft .NET Framework 4.8

Runbook Surveyor does not offer language localization. **US English** is the only language variant supported in Office and Windows.

Installation

Microsoft Word and Visio must be installed to operate the Runbook Surveyor and requires Microsoft .Net Framework 4.8 be installed. The Surveyor needs to be installed on a machine that has access to the Orchestrator database and must be run under a Windows user account that has read access rights on the Orchestrator database. During configuration you will require the path to the extensions folder located on the management server.

System Center Orchestrator 2019 or earlier:

C:\Program Files (x86)\Common Files\Microsoft System Center 2012\Orchestrator\Extensions

System Center Orchestrator 2022 or later:

C:\Program Files\Common Files\Microsoft System Center 2012\Orchestrator\Extensions

The extensions folder location can be local or a network location. If using a network location, the current Windows user will need read access rights for that location. Once the prerequisites are installed you can run the Surveyor installer. This adds a Start menu item in Kelverion Automation -> Kelverion Runbook Surveyor for Microsoft System Center Orchestrator.

Licensing the Runbook Surveyor

After installing the Runbook Surveyor, you must provide a valid Keverion license before generating documentation and diagrams. Place this on the host system where Runbook Surveyor is installed.

To deploy the license file to System Center Orchestrator 2019 or earlier:

1. Copy the .KAL license file to %PROGRAMFILES(X86)%\Keverion Automation\Licenses

To deploy the license file to System Center Orchestrator 2022 or later:

1. Copy the .KAL license file to %PROGRAMFILES%\Keverion Automation\Licenses

Uninstalling

To uninstall Runbook Surveyor:

1. In the Windows Control Panel go to Control Panel->Programs->Programs and Features.
2. Select Keverion Runbook Surveyor.
3. Right click and select uninstall.
4. Select 'Yes' when prompted to uninstall.

Note: When uninstalling the Runbook Surveyor, the installed license is not removed.

Configuring

At first launch of the Runbook Surveyor, you will be asked to accept the **End User License Agreement** and then asked to customize your configuration. You can return to these settings in the future by using the **Settings** button on the **Generate Documentation** dialog.

Orchestrator Settings

These settings point to your Orchestrator installation.

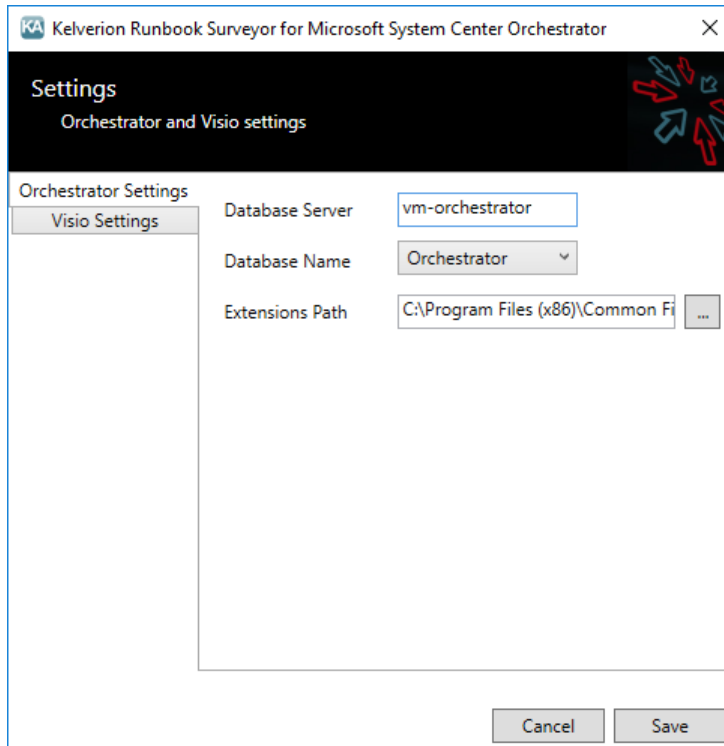


Figure 1

Database Server – The network name or IP address of the Orchestrator SQL Server location. Please make sure the current Windows user has the appropriate rights to the SQL Server at this location.

Database Name – The Orchestrator database name. Please make sure the current Windows user has the appropriate rights to the Orchestrator database.

Extensions Path – Specify the path to the Orchestrator Extensions folder. This can be a local or network location you have permission to read. The extensions path is used to obtain the required images for documenting runbooks. This field is only used during the configuration stage. The Orchestrator extensions folder is located on the management server.

System Center Orchestrator 2019 or earlier:

C:\Program Files (x86)\Common Files\Microsoft System Center 2012\Orchestrator\Extensions

System Center Orchestrator 2022 or later:

C:\Program Files\Common Files\Microsoft System Center 2012\Orchestrator\Extensions

Visio Settings

These settings provide visual customization of the generated Visio diagrams and can be used to customize the look and feel of your diagram.

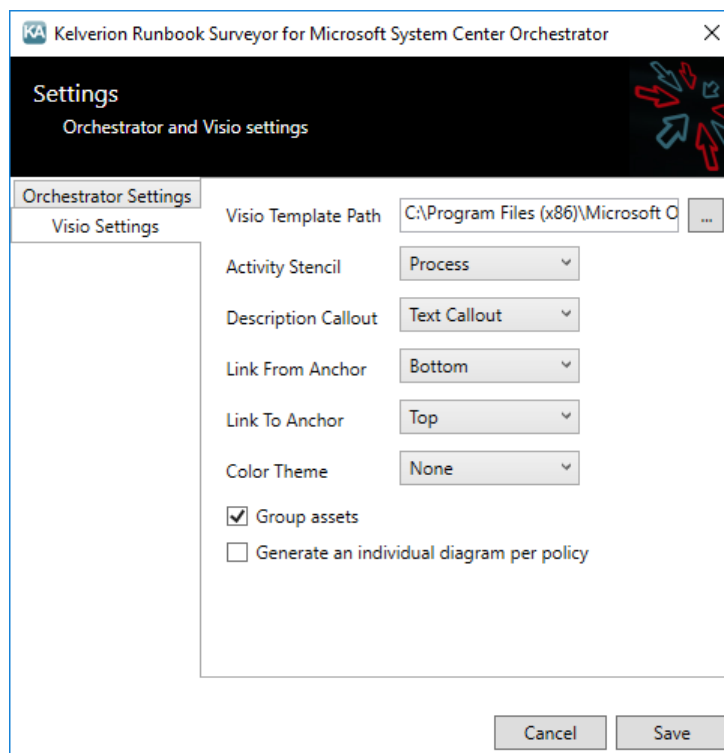


Figure 2

Visio Template Path – Visio template contains the shapes used to diagram.

Activity Stencil – The shape used to represent an Orchestrator activity.

Description Callout – The shape used to contain Orchestrator activity descriptions.

Link From Anchor – The location where the from link anchors to the activity. Options include Bottom, Top, Left and Right. Choose the option that best suits your workflows. Default is Bottom.

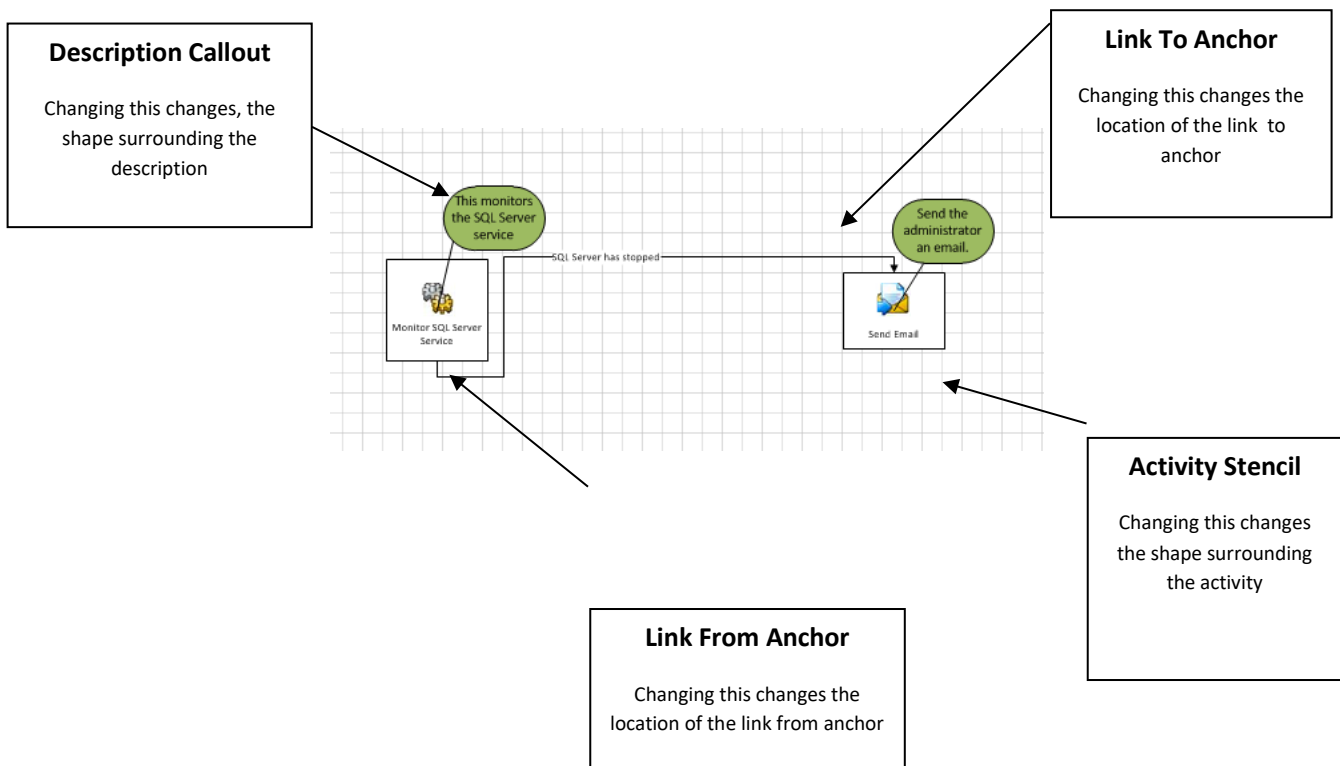
Link To Anchor – The location where the to link anchors to the activity. Options include Bottom, Top, Left and Right. Choose the option that best suits your workflows. Default is Top.

Color Theme – Changes the color scheme. Default is None.

Group assets – This locks the activity stencil, activity name and image into a group allowing easier editing of the diagram.

Generate an individual diagram per policy – When checked this creates a new Visio file for each runbook.

The above settings in **Figure 2** define the look and feel of the following diagram example.



Operation

Start by selecting the folder or runbook you wish to document. If you select a folder, all folders and runbooks will be documented recursively.

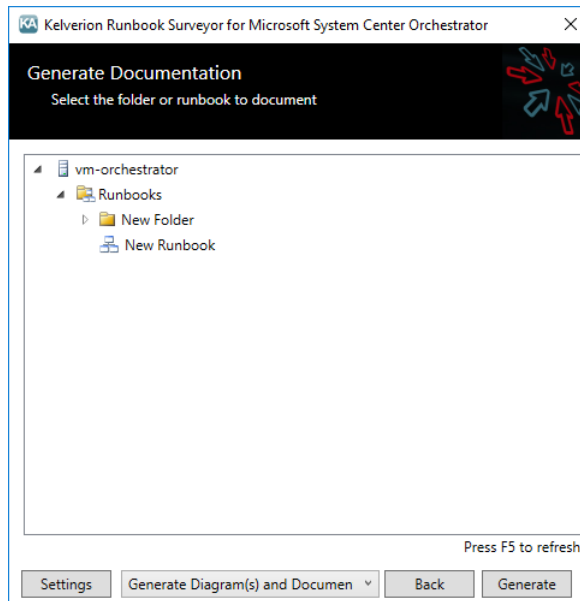


Figure 3

You have the option to:

- Generate Diagram(s) and Document
- Generate Diagram(s)
- Generate Document

After selecting your runbook or folder and the documentation type, press **Generate** to create your documentation. When generating diagrams, the default behavior will create a new page for each runbook. This can be overridden in the **Settings** on in the **Visio Settings** tab by selecting **Generate an individual diagram per policy**.

Visio generation requires that “Measurement system” in the Windows Control panel under Region in the advanced settings be set to “U.S.”.

When generating a Word document, the order of the activities will not match the order of the activities in the Runbook. Word document generation only lists the activities that are in the selected runbook and does not provide any ordering or branching. Use the generated Word document as a starting point.

Logging

A diagnostic log named ***surveyor.log*** is located in %programfiles(x86)%\Keverion Automation\Keverion Runbook Surveyor for Microsoft System Center Orchestrator\ for **Runbook Surveyor for System Center Orchestrator** or in %programfiles%\Keverion Automation\Keverion Runbook Surveyor for Microsoft System Center Orchestrator\ for **Runbook Surveyor for System Center Orchestrator 64-bit**.