



AUTOMATION PORTAL

Release Notes

Version 3.8

September 2023

Introduction

The **Kelverion Automation Portal** is an easy to implement self-service front end for your automation solutions. It offers a versatile interface without the lengthy list of prerequisites required by many other self-service portals available today.

The Automation Portal ethos is to **keep things simple and flexible**. The portal has been designed to complement the existing Automation platforms and does not attempt to replicate the automation platforms capability. Integration with the automation tools takes place via the Automation portal database and is most easily achieved using the Kelverion integrations for SQL.

The Automation Portal has been designed for use with **System Center Orchestrator and Azure Automation** in mind, however it equally complements any automation platform or scripting language that can read and write to the Automation Portal database.

The Automation Portal is simple to implement, but even more importantly it is easy for your end users to navigate, and by adding a simple web interface to your solutions you can allow users to easily interact with your automated solutions.

Trademarks

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Accessibility Statement

The [Web Content Accessibility Guidelines \(WCAG\)](#) defines requirements for designers and developers to improve accessibility for people with disabilities. It defines three levels of conformance: Level A, Level AA, and Level AAA. The Automation Portal is partially conformant with WCAG 2.1 level AA.

System Requirements

The Keverion Automation Portal has the following system requirements:

OnPrem

- Windows Server 2019 or Windows Server 2022
- SQL Server 2017, SQL Server 2019, or SQL Server 2022
- Web Server (IIS) Role (using HTTPS)
 - Web Server
 - Security
 - Windows Authentication Role
 - Application Development
 - ASP.NET 4.7 (Windows Server 2019) / ASP.NET 4.8 (Windows Server 2022) Role
- Microsoft .NET Framework 4.8
- Microsoft SQL Server 2012 Native Client – QFE
(<https://www.microsoft.com/en-us/download/details.aspx?id=50402>)

Note: When hosting the database or server in the Cloud, expenses will be incurred. Please review and confirm that the tier matches your cost and usage requirements.

Azure

Note: Azure expenses will be incurred. The App Service pricing tier is set F1, and the SQL Database pricing tier is set to Basic. Please review your App Service and SQL Database plans and adjust them in Azure to suit your needs.

- Azure subscription
- [PowerShellGet PowerShell Module](#)

Important: A Client Secret is created that expires in 12 months. See **Updating Client Secret** in the User Guide for further details.

An Always Encrypted Certificate is created that expires in 12 months. This is saved to the folder the PowerShell script is run from with the name “Automation Portal.pfx”. Follow best practices to backup and secure this file.

To install the latest version, run the following cmdlet.

```
Install-Module -Name PowerShellGet -Force
```

- [Az PowerShell Module](#) required version 10.3.0

To locate the current version, run the following cmdlet.

```
Get-InstalledModule -Name Az
```

To install the required version, run the following cmdlet.

```
Install-Module -Name Az -Force -RequiredVersion 10.3.0
```

- [SqlServer PowerShell Module](#) required version 22.1.1.

To locate the current version, run the following cmdlet.

```
Get-Module -ListAvailable -Name "SqlServer"
```

To install the required version, run the following cmdlet.

```
Install-Module -Name SQLServer -Force -RequiredVersion 22.1.1
```

- [Microsoft Graph PowerShell Module](#) required version 2.5.0

To locate the current version, run the following cmdlet.

```
Get-Module -ListAvailable -Name "Microsoft.Graph"
```

To locate the required version, run the following cmdlet.

```
Install-Module -Name Microsoft.Graph -Force -RequiredVersion 2.5.0
```

Web Browser

- Google Chrome 114.0
- Firefox 114.0
- Microsoft Edge 114.0
- JavaScript and Cookies enabled.

Internet Information Services (IIS) setting

Authentication

The on-premises Automation Portal requires that Windows Authentication be turned on in IIS. After installing the portal, verify these values are correct.

1. Open the **Internet Information Services (IIS) Manager**.
2. Locate and select the **Kelverion Automation Portal** in **Sites**.
3. Locate **Authentication** in **IIS** settings and double click.
4. Enable **Windows Authentication**.
5. Disable **Anonymous**, **ASP.Net** and **Forms Authentication**.



Authentication

Group by: No Grouping		
Name	Status	Response Type
Anonymous Authentication	Disabled	
ASP.NET Impersonation	Disabled	
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Enabled	HTTP 401 Challenge

HTTPS

HTTPS must be configured for the Automation Portal to function. To enable HTTPS in IIS please refer to [How to Set up an HTTPS Service in IIS](#).

Automation Portal License

After installing the portal, you must provide a valid Keverion license to activate the portal and REST API (Azure only). For an on-premises install, provide the fully qualified domain name (FQDN) of your IIS Server to Keverion when requesting a license. For an Azure install, provide the Application ID value recorded as part of manual install to Keverion when requesting a license.

1. Click the **Admin** gear.
2. Click **Settings**.
3. Click the **License** tab.
4. Click the **Upload** button in the **License** section to upload a license.
5. Select a KAL file.
6. Click **Upload icon**.

Change History

3.8

- Added a **Secure Text Box** field option that you can use in your offerings to protect sensitive data. Data typed into Secure Text Box offering fields will be protected using the SQL Server Always Encrypted feature. (For On-Prem installs see **Enable Always Encrypted** in the User Guide for further details.)
Note: To build Orchestrator runbooks that will access and modify data stored in encrypted database columns, you must upgrade to the Keverion Integration Pack for SQL Server 3.2. Similarly, when building Azure Automation runbooks that will access and modify data stored in encrypted database columns, you must upgrade to the Keverion Integration Module for SQL Server 2.4.
- Updated REST API to support the **Keverion Integration Module for Keverion Automation Portal 1.0** (Azure version only).

- Query Password and Secure Text Box database values are automatically encrypted as part of the Azure install/upgrade. (For On-Prem installs see **Enable Always Encrypted** in the User Guide for the required steps.)
- On-Prem administrations will now receive an alert if Always Encrypted has not been configured for the first time.
- Added support for the OAuth 2.0 client credential grant type to the REST API.
- Improved checks for invalid tokens in Azure.
- A security issue was addressed that could cause a query password to be logged by IIS.
- General bug fixes.

3.7 Update 1 (build 8489 Azure)

- New Azure Install/Update Scripts.

3.7 (build 8424)

- Added support and integration with the Keverion Automation Portal Mobile app for use with iOS (Azure version only).
- Added Mobile Active setting for Offering and Offering folders. (Azure version only).
- Added Mobile Active filters for Offering table. (Azure version only).
- Added Enable/Disable Mobile Active options to the Actions on selected menu. (Azure version only).
- Added Mobile App Settings (Azure version only).
- Fixed toolbar sizing bug.
- Improved licensing details.
- Moment.js was updated to address a security vulnerability.

3.6

- Added REST API v1 (Azure version only)
- Fixed error on Request Details page when prefill URL query string exceeded maximum query string length.
- Fixed issue with case insensitive search not working.

3.5 Update 1 (build 8082 On-Prem)

- Fixed error on Request Details page when prefill URL query string exceeded maximum query string length.
- Fixed issue with case insensitive search not working.

3.5 (build 7948)

- Improved security group browsers.
- Improved accessibility.
- Added AzureAD module check in Azure update script.
- General bug fixes.

3.4

- Improved security group browsers.
- Reorganized admin settings UI.
- Moved dashboard out of admin menu.
- Added developer role/group.
- Added dashboard role/group.
- Added team group on offering.
- Added filters to admin views.
- Added radio button as query input.
- Added “In Use By” column for queries and lists.
- Added file attachment support for Azure.
- Added global search for Services, Offerings and Wiki.
- Added the data field to Request filtering.
- Added a display only table field.
- Added column sort to Favorites, Services, Offerings and Wiki
- Added column sort to admin Log and Feedback.
- Added log export.
- Added Azure Key Vault support for Always Encrypted columns (where App Registration and App Service are in the same tenant).
- Added case insensitive regex option to text box field.
- Added dashboard refresh rate.
- Added compact view for use in iframe.
- Fixed UI issues.
- General bug fixes and enhancements.

3.3 Update 2 (build 7689)

- Fixed cascading queries when used with drop down list.
- Fixed query tables are not always loading.

3.3 Update 1 (build 7685)

- Fixed issues related to AD Group Browsers

3.3 (build 7640)

- Performance improvements.
- Added Admin Dashboard showing a live snapshot of time and cost saved as well as request states and top offerings.
- Added On-Prem support for High availability (HA) via Windows Network Load Balancing (NLB) (additional licensing fees apply).
- Updated icon set from hundreds to thousands of icons to choose from.
- Added Windows Active Directory and Azure Active Directory Group Browsers.
- Added a Maintenance section in administrator Settings. This allows an administrator to purge deleted requests, logs, and feedback from the portal database.

- Added Offering Favorites to reduce the number of clicks to users most frequently used offerings.
- Added Request tag field.
- Separate Azure install and update scripts for improved installation experience.
- Fixed UI issues.
- Fixed issue when Query uses a stored procedure not in the default schema.
- General bug fixes and enhancements.

3.2 Update 2 (build 7615 Azure)

- Fixed an issue with Azure AD where a user has many assigned apps.

3.2 Update 1 (build 7564 On-Prem)

- Fixed On-Prem installer issue with TLS 1.2

3.2 (build 7496)

- Performance improvements.
- Improved UI for tables in the confirm request dialog.
- Improved UI for theme selection.
- Added clickable portal logo returns to service page.
- Added subtitles to field parameters for easier identification when designing a query.
- Added subtitles to list fields.
- Added multiple Active Directory support for security groups.
- Added reject reason when rejecting a request.
- Added documentation updates.
- Added feedback form.
- Fixed issue with markdown title.
- Fixed issue with text field as query input with regex causing tables to load.
- General bug fixes and enhancements.

3.1

- Added file attachment field type.
- Add stored procedure for queries.
- Add Offering Pre-Fill URL.
- Added @ClientHostName client parameter for queries for On-Prem version.
- Add query support for list field types.
- Added offering folders in Services.
- Added @User and @ClientHostName support for hidden field type value.
- General bug fixes and enhancements.

3.0

- Added Copy Request action on Requests.
- Added action on multiple Requests.

- Added Request History.
- Added user selectable themes.
- Added list and card view to Services, Offerings and Wiki.
- Changed top menu to left sidebar menu.
- Imported items are now imported to the bottom of the list.
- Request message field supports displaying text in markdown format.
- Added RowVersion column to Request table.
- Added @User variable for Queries.
- Added an action button to Offering markdown with Edit and Clear actions.
- Added a clear button on Offering markdown edit page.
- Fixed Request action options.
- General bug fixes and enhancements.

2.2 Update 5 (build 6926 Azure)

- Fixed issue with multiple entries in UserTokenCache table in Azure.
- Azure Upgrade script now upgrades previous 2.2 versions.

2.2 Update 4 (build 6892)

- Fixed error when submitting a request and single and multi-select tables are optional and no value selected.

2.2 Update 3 (build 6878)

- Fixed single and multi-select list clipping.

2.2 Update 2 (build 6870)

- Fixed duplicate requests when canceling and editing a request before submitting.

2.2 Update 1 (build 6857 On-Prem)

- Fixed installation error when using SQL Windows Authentication

2.2 (build 6830)

- Added Error log.
- Added Offering markdown.
- Added Request resubmit.
- Fixed Azure database connection string bug
- Added tooltips on Query picker.
- Added Reject to actions on Requests.
- Added Approve and Reject actions on request details.
- Added Query validator to prevent ORDER BY
- Added **Actions on Selected** to top of admin tables.
- Disabled submit button on Confirm Request dialog after clicking to prevent multiple requests.

- Added timestamp to export.
- General bug fixes and enhancements
- Added Wiki feature.

2.1

- Cascading Fields
- Azure installation script
- Hidden field type
- Request table and Offering table improvements.
- Request table search
- SQL syntax test
- Request message field displays data with line returns.

2.00

- Azure support (runs as Azure Web App)
- Azure Active Directory Support
- Request Approvers added.
- Import/Export of configurations
- Request review prior to submission
- Group Privileges support updated.
- Reformat of request xml to be more readable in the request
- Mandatory fields more visible
- Improve visibility of request errors for mandatory fields
- External Reference Id added to Request list and searchable.
- General bug fixes and enhancements

1.02

- Fixed issue with Query fields page selection resetting the web page to top of page.
- Fixed issue with extensive list values overflowing the table on the List view.
- Fixed issue with Internet Explore compatibility mode.
- Added the ability to select and unselect a value in a single or multi select list.

1.00

- Initial version