

cherwell

Cherwell Service Management

Microsoft Teams Integration mApp v1.0



 Microsoft

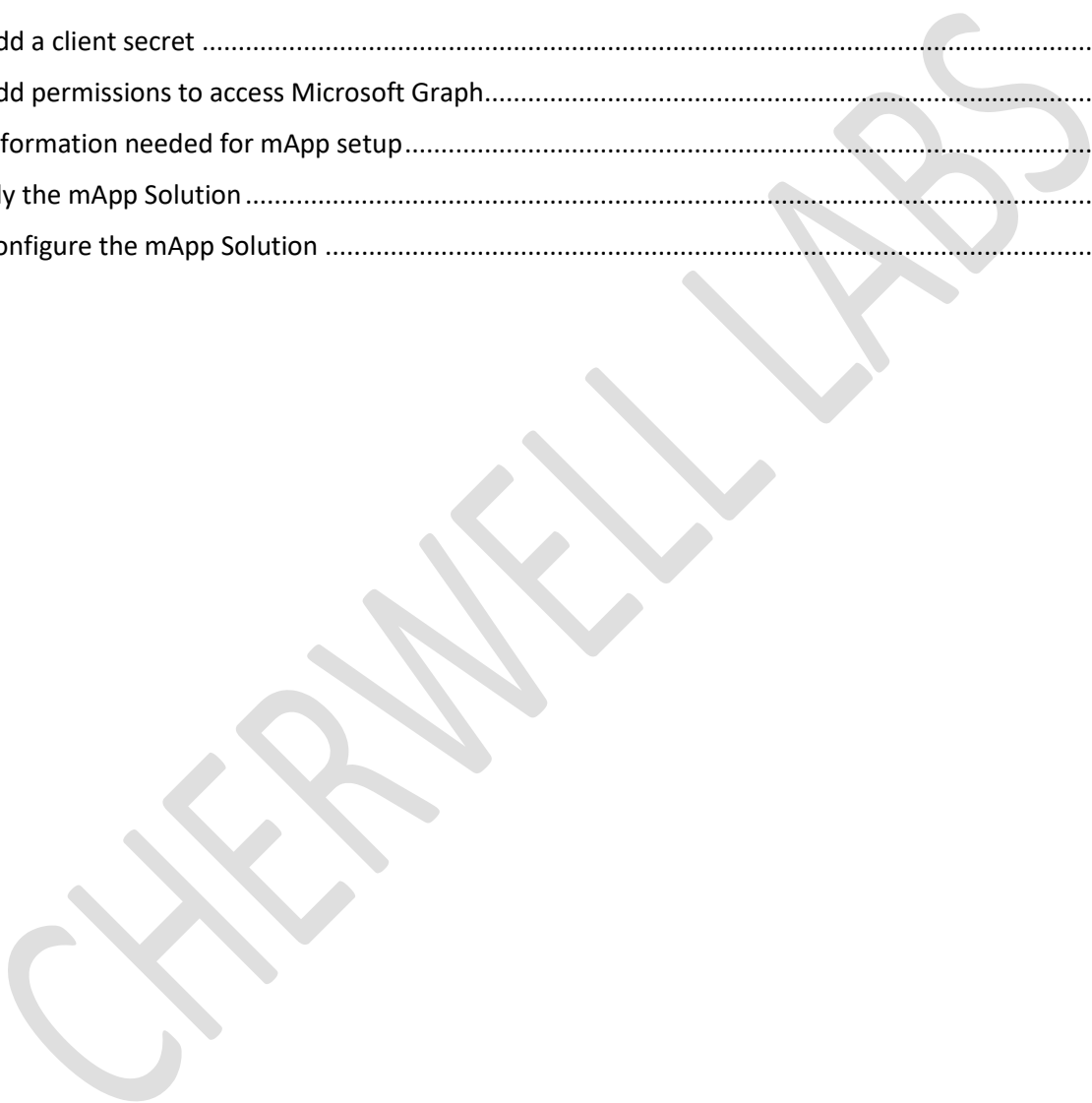
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Cherwell Software
www.cherwell.com

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Cherwell Software, LLC
www.cherwell.com
info@cherwell.com
+1.719.386.7000
10125 Federal Drive, Suite 100
Colorado Springs, CO 80908 USA

Microsoft Teams Integration mApp v1.0

Overview

Cherwell offers a free Microsoft Teams Integration mApp® that enables strong collaboration between CSM and Microsoft Teams.


You can use the Microsoft Teams integration to:

- Create a new private team channel.
- Invite other CSM users/customers to the channel.
- Send messages to the team channel from the Incident object.
- Refresh the message list to view the most recent messages.
- Chat history will be recorded in a Journal and Ticket resolution.

Visit the [Cherwell Marketplace](#) to download this free mApp today.

Overview Activity Journals **Microsoft Teams** Tasks (0) Related CIs (0) SLA

Team Name: Service Request-102522


Invite User: 


Aaron Alexander - 9/8/2020 2:24 PM

sure what do you need ?



Cherwell Demo - 9/8/2020 2:23 PM

Hi Aaron, i need some more info from you.

type a message 



Team Members

-  Support Demo
-  Aaron Alexander

Platform Version Requirements: Tested on CSM 10.0.0

Content Version Requirements: Tested on CSM 10.0.0

The Microsoft Teams Integration mApp may or may not work on previous content versions, but as with any mApp Solution, you should test it on your customized environment.

Prerequisites:

- Administrator rights to register new apps in [Azure Portal](#) using either a work or school account or a personal Microsoft account
- A user account setup in the [Azure Portal AD](#) that we will then use to send messages on behalf of within Teams, this can be an account such as the Support Team. ***(You will need the Username and Password on setup of the mApp)***

Support

This is a Cherwell Labs mApp Solution intended to showcase experimental or beta-level content features in Cherwell Service Management. Functionality, testing, and documentation are limited or incomplete. Cherwell support is not provided for this mApp Solution, so install it at your own risk on a test environment before installing it on a production system.

Terms and Conditions


How the mApp Works

CSM provides the Microsoft Teams Integration mApp so that users can communicate between Teams and CSM using the [Microsoft Graph API](#). Download the mApp Solution from the Cherwell mApp Exchange. Use the Apply mApp wizard to apply the mApp Solution to your CSM system. The Apply mApp wizard generates a Blueprint, which can then be viewed and published to a test or live system to commit the changes.

Item Category	Item	Typical Merge Action
Business Object	Incident	Merge
	Customer Internal	Merge
One-Step Action	Cancel	Import
	Chat History	
	Create Team	
	On Resolve add Chat to Journal	
	Resolve Incident	
	Send Message	
	Set ID	
	Set Values	
	Setup	
Image	Numerous	Import
Stored Expression	Team Member 1	Import
	Team Member 2	
	Team Member 3	
	Team Member 4	
Stored Value	MS Client ID	Import
	MS Client Secret	
	MS Refresh Token	
	MS Tenant ID	
	Support User ID	
Web service	Teams	Import
	Teams Login	

- Import: Add new item.
- Overwrite: Replace target item.
- Merge: Merge differences.
- Don't Change: Referenced by the mApp Solution, but not altered in any way. The mApp Solution includes the definition for informational purposes only (the definition is not imported into the target system)

Register a new application using the Azure portal

1. Sign in to the [Azure portal](#).
2. If you have access to multiple tenants, use the **Directory + subscription** filter  in the top menu to select the tenant in which you want to register an application.
3. Search for and select **Azure Active Directory**.
4. Under **Manage**, select **App registrations**, then **New registration**.
5. Enter a **Name** for your application. Users of your app might see this name, and you can change it later.
6. Specify who can use the application, sometimes referred to as the *sign-in audience*

Supported account types	Description
Accounts in this organizational directory only	<p>Select this option if you're building a line-of-business (LOB) application. This option is not available if you're not registering the application in a directory.</p> <p>This option maps to Azure AD only single-tenant.</p> <p>This is the default option unless you're registering the app outside of a directory. In cases where the app is registered outside of a directory, the default is Azure AD multi-tenant and personal Microsoft accounts.</p>
Accounts in any organizational directory	<p>Select this option if you would like to target all business and educational customers.</p> <p>This option maps to an Azure AD only multi-tenant.</p> <p>If you registered the app as Azure AD only single-tenant, you can update it to be Azure AD multi-tenant and back to single-tenant through the Authentication blade.</p>
Accounts in any organizational directory and personal Microsoft accounts	<p>Select this option to target the widest set of customers.</p> <p>This option maps to Azure AD multi-tenant and personal Microsoft accounts.</p> <p>If you registered the app as Azure AD multi-tenant and personal Microsoft accounts, you cannot change this in the UI. Instead, you must use the application manifest editor to change the supported account types.</p>

7. Don't enter anything for **Redirect URI (optional)**, you'll configure one in the next section.
8. Select **Register** to complete the initial app registration.

When registration completes, the Azure portal displays the app registration's **Overview** pane, which includes its **Application (client) ID**. Also referred to as just *client ID*, this value uniquely identifies your application in the Microsoft identity platform.

Add a redirect URI

A redirect URI is the location where the Microsoft identity platform redirects a user's client and sends security tokens after authentication.

1. Select your application in **App registrations** in the Azure portal.
2. Under **Manage**, select **Authentication**.
3. Under **Platform configurations**, select **Add a platform**.
4. In **Configure platforms**, select the tile for your application type **WEB**.
5. Enter a **Redirect URI** for your app, the location where Microsoft identity platform redirects a user's client and sends security tokens after authentication. (<https://localhost:3000>)
6. Select **Configure** to complete the platform configuration.

Add a client secret

1. Select your application in **App registrations** in the Azure portal.
2. Select **Certificates & secrets** > **New client secret**.
3. Add a description for your client secret.
4. Select a duration.
5. Select **Add**.
6. **Record the secret's value** for use in your client application code - *it's never displayed again after you leave this page and you will need this in the mApp setup.*

Add permissions to access Microsoft Graph

1. Select **API permissions** > **Add a permission** > **Microsoft Graph**
2. Select **Delegated permissions**. Microsoft Graph exposes many permissions, with the most commonly used shown at the top of the list.
3. Under **Select permissions**, select the following permissions:

API / Permissions name	Description	Admin consent required
Channel.Create	Create channels	Yes
Channel.ReadBasic.All	Read the names and descriptions of channels	-
ChannelMember.Read.All	Read the members of channels	Yes
ChannelMember.ReadWrite.All	Add and remove members from channels	Yes
ChannelMessage.Edit	Edit user's channel messages	-
ChannelMessage.Read.All	Read user channel messages	Yes
ChannelMessage.Send	Send channel messages	-
ChannelSettings.ReadWrite.All	Read and write the names, descriptions, and settings of channels	Yes
Contacts.Read	Read user contacts	-
Directory.ReadWrite.All	Read and write directory data	Yes

Team.Create	Create teams	-
Team.ReadBasic.All	Read the names and descriptions of teams	-
TeamMember.Read.All	Read the members of teams	Yes
TeamMember.ReadWrite.All	Add and remove members from teams	Yes
User.Read	Sign in and read user profile	-
User.Read.All	Read all users' full profiles	Yes
User.ReadBasic.All	Read all users' basic profiles	-

4. Select **Add permissions** to complete the process
5. Select **API permissions** > **Add a permission** > **Microsoft Graph** > **Application permissions**.
6. All permissions exposed by Microsoft Graph are shown under **Select permissions**.
7. Select the permission or permissions you want to grant your application. Under **Select permissions**, expand **Files**, and then select

API / Permissions name	Description	Admin consent required
Channel.Create	Create channels	Yes
Channel.ReadBasic.All	Read the names and descriptions of all channels	Yes
ChannelMember.Read.All	Read the members of all channels	Yes
ChannelMember.ReadWrite.All	Add and remove members from all channels	Yes
ChannelMessage.Read.All	Read all channel messages	Yes
ChannelMessage.UpdatePolicyViolation.All	Flag channel messages for violating policy	Yes
ChannelSettings.ReadWrite.All	Read and write the names, descriptions, and settings of all channels	Yes
Chat.Read.All	Read all chat messages	Yes
Chat.ReadWrite.All	Read and write all chat messages	Yes
Directory.ReadWrite.All	Read and write directory data	Yes
Group.Create	Create groups	Yes
Group.ReadWrite.All	Read and write all groups	Yes
GroupMember.ReadWrite.All	Read and write all group memberships	Yes
Team.Create	Create teams	Yes
Team.ReadBasic.All	Get a list of all teams	Yes
TeamMember.Read.All	Read the members of all teams	Yes
TeamMember.ReadWrite.All	Add and remove members from all teams	Yes
User.Read.All	Read all users' full profiles	Yes
User.ReadWrite.All	Read and write all users' full profiles	Yes

8. Select **Add permissions** to complete the process.

Information needed for mApp setup

1. Directory **Tenant ID** (In Azure Portal)
2. Your **Support Account Object ID** this is the account you will send message on behalf of. (Found in the Azure AD user section)

The screenshot shows the Azure AD user profile page for 'Cherwell Demo'. The 'Object ID' field is highlighted with a red box, containing the value '1337b8b2-06fd-42ca-9c54-0b0fc6596f5c'. Other visible fields include Name, User Principal Name, First name, Last name, User type, Member, Source, and Microsoft Account.

Field	Value
Name	Cherwell Demo
User Principal Name	cherwell@cherwell.com
Object ID	1337b8b2-06fd-42ca-9c54-0b0fc6596f5c
First name	Cherwell
Last name	Demo
User type	Member
Source	Microsoft Account

3. Application **Client ID** (On App Overview Page)
4. Your **Client Secret** that you created when setting up the app.
5. Username and Password for the On Behalf of account (Only required Once)

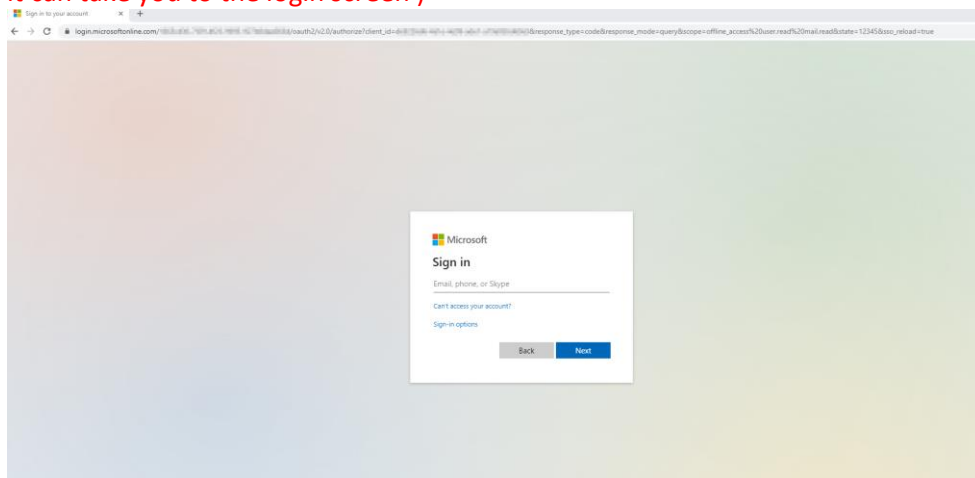
Apply the mApp Solution

To apply the mApp Solution, perform the following high-level steps:

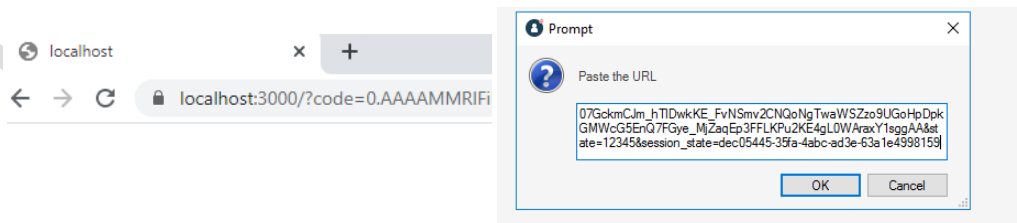
1. Review the recommendations and considerations for applying mApp Solutions. For more information, see [Considerations for Applying mApp Solutions](#).
2. Extract the mApp Solution .zip file to a location that can be accessed by CSM.
3. In CSM Administrator, use the Apply mApp Wizard to apply the mApp Solution. For more information, see [Apply a mApp Solution](#). Select the topic that matches your version of CSM.
Configure the mApp Solution

On applying the mApp Solution, perform the following high-level steps to configure the mApp Solution:

- You will be asked to enter the following info **Client ID, Client Secret, Tenant ID and Support Account Object ID**.
- On publish it will run a one-step to authorise the Support account for the
- on behalf off, this will launch a URL / Web page for you to enter you User Account Name and Password (**You may need to logout of Microsoft 365 if you are already logged in, so that it can take you to the login screen**)



Once logged in you will be redirect to a page this site can't be reached **This is correct**, you need to copy the site url and paste this into the prompt behind.





This site can't be reached

localhost refused to connect.

Try:

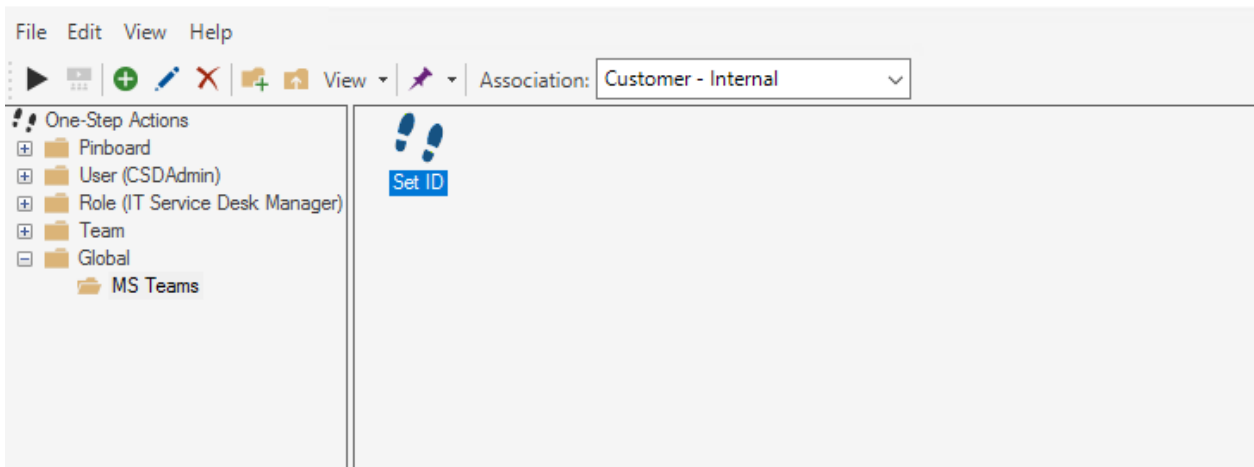
- Checking the connection
- Checking the proxy and the firewall

ERR_CONNECTION_REFUSED

Reload

5. In the Client go to the One Step Manager, Customer Internal, Global Scope, MS Teams Folder and run the Set ID One-step (**This one-step will look up each customers email address and update their Object ID based on Azure**).

One-Step Action Manager



Using the mApp

Create a Team Channel

1. Select the **Microsoft Teams** tab from within an Incident/Request.
2. In the **Invite User** box, select the **Address Book** icon or Type the Name of the Customer / User.
3. Select OK.
4. This will create a private Team and Channel with the Support Team and the added Customer

To send messages to and from Teams:

1. Select the **Microsoft Teams** tab. Create a Team /channel, if one is not already available.
2. Type messages at the bottom of the **Chat** page, and then select the send icon.
3. Select the **Refresh** icon to update the channel with messages from Teams.