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CSM 10.0.0 Upgrade Guide

Legal Notices

The Cherwell Software product suite includes:
- Cherwell Service Management
- Cherwell Asset Management

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Contents

Upgrade CSM

On-premises customers use distinct installers to upgrade the CSM server, web applications, and client components. Then, use the Auto-Deploy installation tool to automatically deploy pre-configured client installations and connections to client machines.

Note: Cherwell SaaS customers should contactCherwell Support for upgrade guidance.

Before you upgrade CSM, take steps to learn about important changes to in the new release. For example, you should:

- Verify that your system meets the System Requirements.
- Read the upgrade considerations for information about upgrading from previous versions of CSM.
- Read the upgrade process steps to help plan your upgrade.
- Read the Release Notes to learn about changes made in the latest CSM version.

Related concepts
Upgrade Considerations for CSM 10.0.0
The Upgrade Process
Related information
System Requirements
Release Notes

Upgrade Considerations for CSM 10.0.0

Find important information to help plan your upgrade to the latest version of CSM.

Requirement for Setting the Base Cherwell® REST API URL

The Cherwell REST API is required for user authentication, third-party reporting tools, and webhooks. The base URL of the REST API must be configured in the **Security** section of CSM Administrator or through the command line.

If you are upgrading to CSM 10.0 from a previous version of CSM, and the base URL was already configured in the previous version, no action is required. The URL carries over to CSM 10.0 automatically during the upgrade process.

If you are upgrading to CSM 10.0 from a previous version of CSM, you will be prompted to enter the base URL in the format https://host.domain/CherwellAPI/api/ during the upgrade process. If you skip this step, you can still install CSM, but an error that says that the application is not configured to communicate with the Cherwell REST API server will display when you attempt to log in.

For more information about configuring the base REST API URL, see Set the Base URL for the Cherwell REST API.

Automatic Upgrading of Web.Config Files

When CSM starts, all five web.config files are now copied to a safe location.

Each of these applications has its own web.config file:

- Web-Forms
- Portal
- Browser Client
- Auto-Deploy (Web Page)
- Cherwell® REST API

Now, on the first request after the IIS site is reloaded for an application, its web.config file is automatically copied to C:\ProgramData\Trebuchet\web.config.portal, web.config.webforms, etc.

This means that, on upgrade or reinstall, application settings are maintained and combined with any new settings. There is now no need to manually copy your old web.config settings prior to upgrade and any changes you made yourself to the web.config files are preserved.

> **Note:** If you make changes to any web.config files *just prior* to upgrading, restart IIS to ensure your updates are preserved.

Unified SAML Authentication through Cherwell REST API

Starting with CSM 10.0, SAML authentication flows through a single endpoint on the Cherwell REST API, no longer through the Cherwell Web Service. This change in endpoint is part of an effort to unify the

authentication process of Cherwell applications and services through the Cherwell REST API, simplifying configuration, maintenance, and troubleshooting.

Due to this change in authentication, if SAML is already configured and enabled in your environment, you will be presented with the SAML login window during upgrade to CSM 10.0; however, that login window will display a server error by default. To move forward with the upgrade, either cancel or close the SAML login window and then log in with your internal CSM credentials.

To resolve the server error on the SAML login window after upgrade, the SAML endpoint must be updated in both CSM and the SAML Service Provider.

Update CSM with SAML Endpoint

To assist with the CSM update, the existing SAML web service URL is automatically updated to match the Cherwell REST API URL in the upgrade prompt. For example, if the REST API URL is https://host.domain/CherwellAPI/api/, the SAML web service URL will be updated to https://host.domain/CherwellAPI (without the /api at the end of the path).

If you cancel the prompt for the REST API URL during upgrade, and then later set the URL either in the **Security** section of CSM Administrator or through the command line, you must manually configure the SAML Service Provider web service URL in the SAML Settings window in CSM Administrator in the following format: https://host.domain/CherwellAPI. For more information, see Configure SAML as a CSM Service Provider.

Update SAML Service Provider Assertion Endpoint

After the SAML Service Provider web service URL is updated in CSM, the SAML assertion endpoint must be updated in your SAML Service Provider. The endpoint is the URL to the Cherwell web service page that is used as the assertion consumer. This URL is the domain followed by CherwellAPI/saml/assertion. For example, if the previous URL is https://www.mycompany.com/CherwellService/saml/assertion.aspx, the new URL should be changed to https://www.mycompany.com/CherwellAPI/saml/assertion.

> **Note:** The Cherwell REST API endpoint is the only required endpoint. If the Cherwell Web Service endpoint still exists, simply delete it, as it is no longer supported. Also, file extensions such as .cshtml are no longer valid.

For more information, see Manually Add CSM as a Relying Party.

Upgrade Considerations for Earlier Versions

- CSM 9.7.0
- CSM 9.6.0
- CSM 9.5.0
- CSM 9.4.0

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The Upgrade Process

Learn the recommended process for upgrading all CSM components. Cherwell recommends that you upgrade all components at the same time.

Note: If you make changes to any web.config files just prior to upgrading, restart IIS to ensure your updates are preserved.

Important: For on-premise customers, if the version you are upgrading from is prior to CSM 9.6.3, you will need to follow a stepped approach for the upgrade. This only applies if you are upgrading to version 10.0.x, unless otherwise noted. For more information, see https://zero.comaround.com/link/f0cf62f73e6a4f52890108d82d9cfa40/.

Task	Notes
1. Prior to upgrade, stop all CSM Services.	Use the Server Manager or the Configuration Command Line Utility to stop the Application Server and the Cherwell Service Host. See Application Server Command-Line Options and CherwellMQS Command Line Options. Use the Windows Services Manager or the Configuration Command Line Utility to stop the Cherwell Message Queue Service. See CherwellMQS Command Line Options.
2. Upgrade the Cherwell server.	Follow the steps to Run the Server Installation.
3. Configure the server connection.	Perform this task when prompted by the server installation. Follow the steps to Configure the Server Connection.
3. Upgrade the web applications.	Follow the steps to Run the Web Applications Installation.
4. Configure Auto-Deploy during the upgrade of the web applications.	This task is only required if Auto-Deploy was not configured during the original installation of CSM. Follow the steps for Configuring Auto-Deploy.

Task	Notes
5. Upgrade remote instances of server applications.	This includes the Scheduling Server, the Automation Process Server, the Trusted Agents Server, and the Configuration Scheduling Server. Follow the steps in Upgrading Remote Servers.
6. Reboot the installation server.	If you installed CSM and Portal and Browser Apps on different servers, reboot both servers.
7. Restart all CSM services.	Use the Server Manager to start the Application Server and these services: Mail Delivery, E-mail and Event Monitor, Scheduling, and Automation Process. Use the Windows Services Manager or the Configuration Command Line Utility to start the Cherwell Message Queue Service.
8. Run Auto-Deploy or manually upgrade Desktop Clients.	Follow the steps to Use Auto-Deploy or Run the Client Installation.
9. Instruct CSM web application users to clear their browser cache.	This includes the CSM Portal, CSM Browser Client, and the REST API Discovery Tool.

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Upgrading Remote Servers

If you install CSM server applications on remote servers, you must upgrade each server application when you upgrade CSM. This includes the Cherwell Service Host and all Trusted Agents Servers.

For best results, follow this process to upgrade CSM server applications on remote servers:

1. Stop all CSM services on the remote machine. For example:
   - Use the Server Manager or the Configuration Command Line Utility to stop the Application Server and the Cherwell Service Host. See Application Server Command-Line Options and CherwellMQS Command Line Options.
   - Use the Windows Services Manager or the Configuration Command Line Utility to stop the Cherwell Message Queue Service (CherwellMQS). See CherwellMQS Command Line Options.
   - If you use Trusted Agents, stop the Trusted Agents Service on all servers on your network.
2. Perform the CSM Server upgrade.
3. Perform the upgrade for the CSM server application on the remote machine. For example, run the Trusted Agents Server installer on a server on the same network as your private resource.
4. Start the server application service on the remote machine.
5. Test the connection between CSM and the CSM server applications on remote servers. For example, use the Trebuchet.ServerConfigTool.exe file on the remote server to test the connection between Trusted Agents Hub and the Trusted Agents Server.

> **Note:** You must upgrade all Trusted Agents Servers so they are compatible with the version of CSM running the Trusted Agents Hub. Incompatible versions are logged to the Trusted Agents Server log. For more information, see Trusted Agents Logging.

Related concepts
Upgrade Considerations for CSM 10.0.0
The Upgrade Process
Related information
CherwellMQS Command Line Options
Install the Trusted Agents Service
Configure the Trusted Agents Service

System Upgrade Tool

The System Upgrade tool allows a system administrator to upgrade a CSM Database to a new version. This program usually runs automatically when a new version of CSM is loaded.

There are some systematic windows that might populate as the system runs the update. You are not required to do anything when these windows open.

The System Upgrade tool (accessed from the Cherwell Service Management installation directory) should only be used if the database was not upgraded as part of an application upgrade or an installation.

> **Note:** Only Users with permissions, for example an Administrator User, can use the System Upgrade tool.

To upgrade a database:

1. Open the System Restore tool (Start>All Programs>Cherwell Service Management>Tools>System Upgrade).

   The Connect to Cherwell Service Management - System Upgrade window opens.

2. Click to select the **database** to upgrade.

3. Select **OK**.

   The System Upgrade window opens to verify the upgrade.

4. Select **OK**.

   The Cherwell System Upgrade login window opens.

5. Provide the **User ID** and **Password**.

6. Select **OK**.

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