CTX-Manual-Intervention Deployment Plan

Contents

Versions

Document Revisions

The following revisions have been made to this document

Date	Revision	Notes
27/7/2021	1.0	First Full Release

Module Versions

This version of the CTX-Manual-Intervention deployment plan is relevant up to version 1.0 of the CTX-Manual-Intervention module.

Preface

About this Manual

This document provides a guide on how to deploy the CTX-Manual-Intervention module in your Cortex system.

Audience

This document is intended for those who require the use of CTX-Manual-Intervention module.

Related Material

Document
CTX-Manual-Intervention – User Guide
CTX-Manual-Intervention.studiopkg
CTX-Manual-Intervention-Components.zip

Abbreviations used in this Document

SQL Structured Query Language

DB Database

1 Requirements

This document details all the steps required to deploy the CTX-Manual-Intervention module.

Requirements:

- SQL Server Management Studio Access to the Cortex Database Server
- Minimum Cortex v6.4 installed on the Cortex Application Server
- Minimum SQL Server 2012 (version 11.0.7001.0) installed on the Cortex Database Server
- CTX-Logging Module installed on server
- CTX-Manual-Intervention files:
    - CTX-Manual-Intervention-Components.zip – UI components
    - CTX-Manual-Intervention.studopkg – flows and subtasks
- Additional Subtasks included with this .studioPkg file
    - CTX-LivePortal-Artefacts – used to generate the dashboard boxes
    - CTX-Shared-Library – Gather AD Groups subtask (only required for Access Control extension)
- Config File created and populated

2 Import CTX-Manual-Intervention

To deploy the CTX-Manual-Intervention module on your Cortex system, CTX-Manual-Intervention Studio Package needs to be imported on your Cortex system. To do this:

- Download the CTX-Manual-Intervention Studio Package
- Import the Studio Package in Cortex Gateway
- Ensure the relevant users have the required permissions in 'Studio Authorisation'
- Publish the flows and subtasks

After this, all users in the authorised groups will be able to view and execute the subtasks.

3 Deployment Artefacts

3.1 CTX-Logging Module

For the CTX-Manual-Intervention module to work, the Cortex-Logging database along with the schema must exist on the server where the Cortex databases are hosted. The studioPkg files also need to be imported into Cortex Gateway.

This is documented as part of the CTX-Logging Github Module - **https://github.com/CortexIntelligentAutomation/CTX-Logging**.

3.2 Manual-Intervention Config File

For Dual Site installs, the databases are replicated – this means that any configuration stored in the ConfigStore database will be the same for both servers. In order to correctly identify the correct endpoints, the module requires a config file with some parameters:

- Flow API URL – used for triggering UI Flows to the correct server
- LivePortal URL – used for opening the UI flows in a new tab on the correct server
- SQL Server – used for connection strings to the Logging Database
- Logging Database Name – used for connection strings to the Logging Database
- Flow API Username (optionally encrypted) – used for triggering UI Flows
- Flow API Password (encrypted) – used for triggering UI Flows
- Access Control – Enabled or Disabled
- Access Control credentials (if Enabled)

The file should be created under C:\Cortex\Config and must be named 'Manual-Intervention.cfg'.
If the Cortex Installation is not in C:\Cortex\ then the GMIC-Get-Manual-Intervention-Config subtask must be updated.

The file should be populated using the template in **Appendix A**.

3.3 LivePortal Components

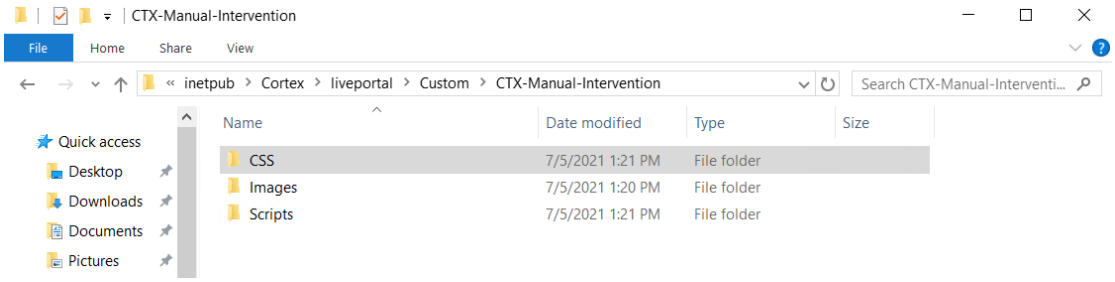
Some additional files are required for the interactive LivePortal flow which allows the UI Escalations to be dealt with. These are stored in the CTX-Manual-Intervention-Components.zip file in the Github repository.

1. The LivePortal directory needs to be located. This is usually in the following path:

   C:\inetpub\Cortex\liveportal\

2. If a folder called **Custom** does not exist inside this director, it should be created.
3. Within the **Custom** folder, an empty folder called **CTX-Manual-Intervention** should be created.

4. The **CTX-Manual-Intervention-Components.zip** folder should then be unzipped somewhere on the server (e.g. Downloads directory).
5. The contents of this folder should be copied inside the **Custom\CTX-Manual-Intervention** folder.



Note that the destination for the files may be different based on the Cortex LivePortal Site configuration in IIS.

4 Appendix A – Configuration File

The below example shows the format of each parameter in the config file. For standard installs, only the highlighted sections need to be updated.
If Cortex is not installed with SSL Certificates or if the Flow API Username has been changed then these properties may also need updating.

```
; LivePortal URL to open UI Flows
Liveportal-Url = "https://myApp.myDomain.com/liveportal/SequenceHandling.aspx?execution="

; Flow API URL for triggering UI Flows
Cortex-URL = "https://myApp.myDomain.com:10000/api/flow/startflowasync "

; Flow API Username
Username = "CortexFlow"

; Flow API Password (encrypted)
Password = "#_179241136189029!110033205092138121209201089239138~132072154234151!057125182046184038010241174039087#"

; SQL Server Hostname
Database-Server = "myDb"

; Logging DB Name
Database-Name = "Cortex-Logging"

; Uncomment and populate these if Access Control is required:
Access-Control = "disabled"
;AD-Password = "#_179241136189029!110033205092138121209201089239138~132072154234151!057125182046184038010241174039087#"
;AD-Username = "domainUser"
;Domain = "myDomain"
```


Note that the Access Control parameters should be populated as follows:

- Access-Control – set this to ‘enabled’ if Access Control is to be used, otherwise ‘disabled’.
- AD-Username – if Access Control is enabled, remove the ; character at the start of this line and set this to an Active Directory account which has permissions to query the Active Directory (e.g. Service Account).
- AD-Password – if Access Control is enabled, remove the ; character at the start of this line and set this to the encrypted password for the specified user.
- AD-Domain – if Access Control is enabled, remove the ; character at the start of this line and set this to the domain name of the account connecting to AD.

5 Appendix B – Example Flow

Included in the .studioPkg file are the below flows:

- MI-UAD-User-Access-Dashboard
  - Main dashboard flow for viewing the required UIs and logging data related to each process.
- MI-Example-Onboarding
  - Example Manual Intervention flow covering a simple onboarding process.
  - User entry may be required selecting the department, required assets, and approving the request.
- MI-UI-Onboarding-Department / MI-UI-Onboarding-Assets / MI-UI-Onboarding-Approval
  - Example UI flows, triggered from the User Access Dashboard as part of the Onboarding Example process.

You will find documentation within each flow (notes on each workspace) for the MI-Example-Onboarding flow as well as each of the UI flows. This covers the basics of the Manual Intervention module, including how to pass data to / from the UI flows.

This example flow acts as a guide for how to user the Manual Intervention module.
The process itself will be covering:

- Checking if input values are provided such as first / last name
  - If not, for the sake of the example they will be randomised.
- Checking if the Department / Roles inputs are provided
  - If not we will use the Manual Intervention UI to select from the dropdown
- Checking if Asset details are provided
  - If not we will use the Manual Intervention UI
- Manager Approval UI
  - Final break in the process so a user (manager) can approve or deny the requests from the UI

