

Cortex

Interaction

Portal

User Guide

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Versions

Date	Version	Notes
13/02/2023	0.1	Internal release
10/04/2023	1.0	First release

Preface

About this manual

This manual provides a general guide to the use of the Cortex Interaction Portal solution, including service requests, process driven UIs and admin functions.

Audience

This document is intended for users who intend to utilise Cortex Interaction Portal.

Related Material

Document	Version
Cortex Interaction Portal Deployment Guide	2.0
Cortex Interaction Portal Developer Guide	1.0
Cortex Interaction Portal Merging Guide	1.0


Abbreviations used in this Document.

UI	User Interface
UX	User Experience
IIS	Internet Information Services
RBAC	Role Based Access Control

1 Introduction

1.1 AppGyver Overview

The Cortex Interaction Portal is built using SAP AppGyver: a low-code web (and mobile) application building tool which offers pre-built components and the ability to create your own component templates. Also included is integrated logic to issue API requests, navigate pages, show data, and many more options.

 *AppGyver is offered in several different pricing tiers. At the time of writing the Community Edition includes all the core functionality required.*

1.2 AppGyver and Cortex


Using AppGyver's integrated logic and the Cortex REST API, AppGyver can be used to provide Human-in-the-Loop capabilities to Cortex. This is offered by:

1. A generic AppGyver solution with the ability to be extended to fit further needs.
2. A set of generic Cortex modules which handles authentication, service requests, process executions, and much more.

The Web Application itself offers two core methods of interacting with automation:


1. UI-Driven Process (Service Request)

- a. This is a service request catalogue including role-based access control, configurable from the admin settings within the Web App.
- b. Each Service Request can consist of any number of UIs, and each UI can integrate with any number of Cortex Flows.
- c. Every Cortex interaction from a UI will require its own flow, and AppGyver will handle the actions, responses, and navigation – essentially in control of 'orchestrating' the process.
- d. These processes must be initiated by a user, from the relevant service request.

 *An example of a UI-Driven Process would be a traditional web-based wizard to break data entry into a series of screens, guiding the user through completing a task.*

2. Process-Driven UI (Process Flow and User Tasks)

- a. This handles user interactions for a process which may or may not be triggered by a user.
- b. The process is developed and run entirely in Cortex, only breaking for user entry if / when required.
- c. Users can view the pending user interactions from a dashboard, which also supports role-based access control. This can be configured at an individual task level, providing much more fine-grain control of the process.
- d. The components to interact with Cortex are all generic (instead of many bespoke flows for the UI), leaving just the end UIs to be created.

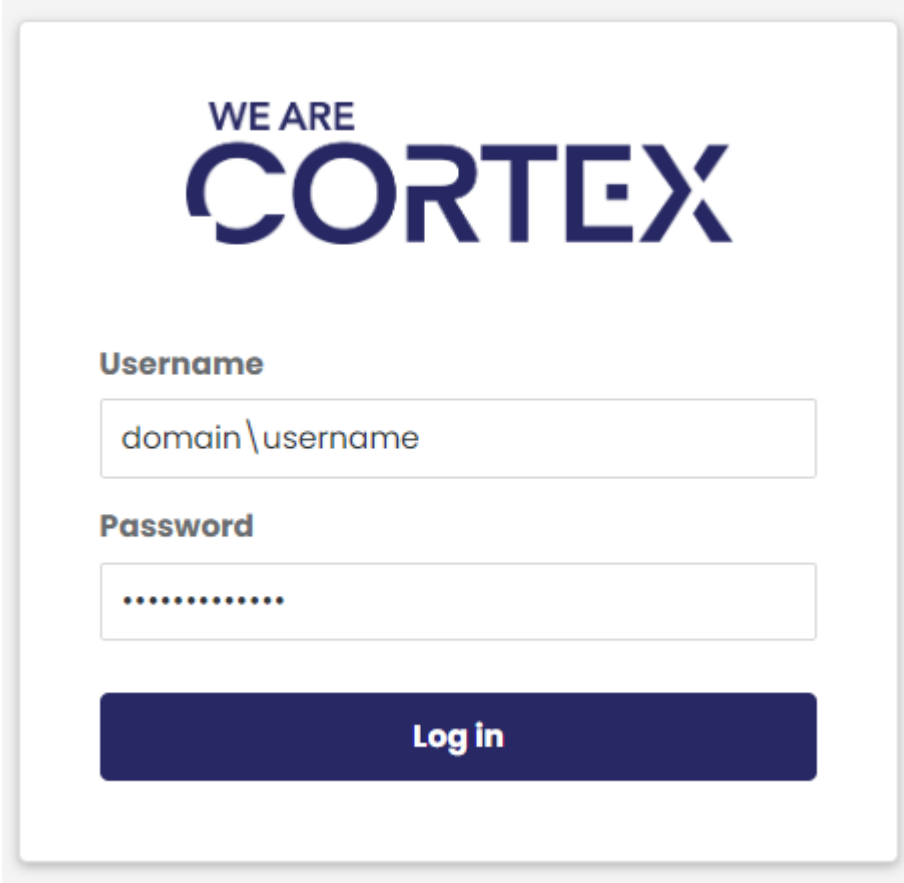
 *An example of a Process-Driven UI would be any process that requires a manual approval step as part of its otherwise fully automated execution.*

The solution includes Role-Based Access Control via Active Directory, which is managed from the Cortex Interaction Portal (via Cortex flows).

2 Log In

To access Cortex Interaction Portal, navigate to the URL provided by your system administrator.

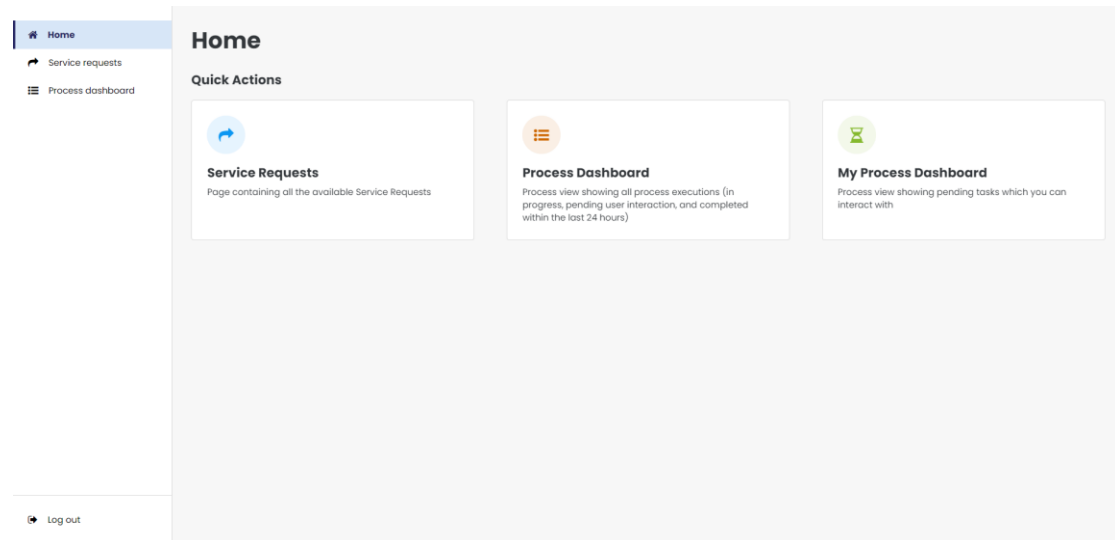
A login screen will be displayed:

The image shows a login screen for the Cortex Interaction Portal. At the top, the logo "WE ARE CORTEX" is displayed in a dark blue font. Below the logo, there are two input fields. The first is labeled "Username" and contains the text "domain\username". The second is labeled "Password" and contains a series of dots. Below these fields is a dark blue button with the text "Log in" in white.

Enter domain credentials, as above, and select 'Log in'.

3 Home Page

After logging in as a non-administrator user, the user will be presented with a home page as shown below.

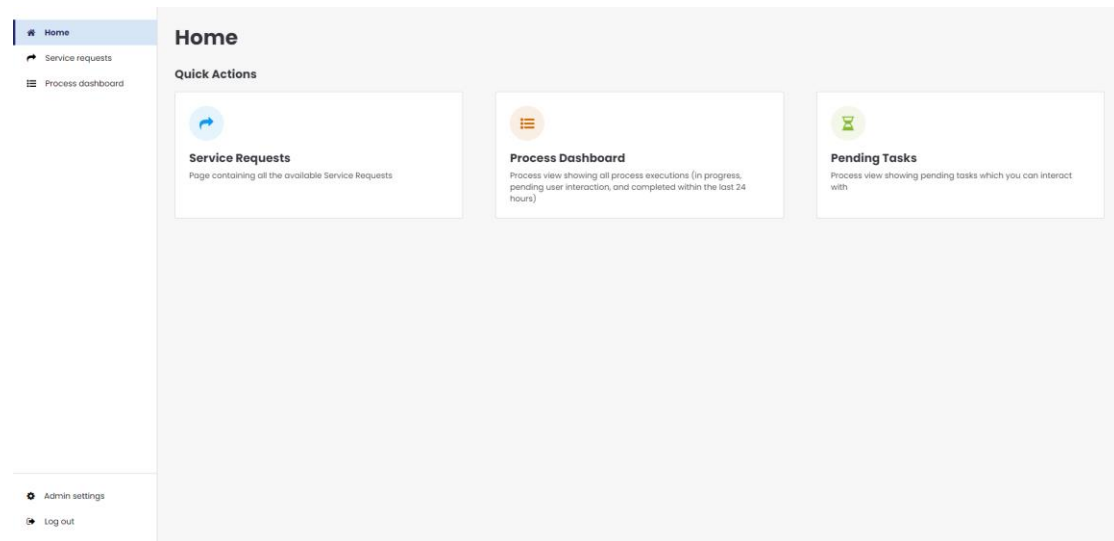


From here, all users may navigate to the following pages:

1. Service Requests
2. Process Dashboard
3. My Process Dashboard

Users have the option to log out, so that they may log in with a different user that may have different permissions.

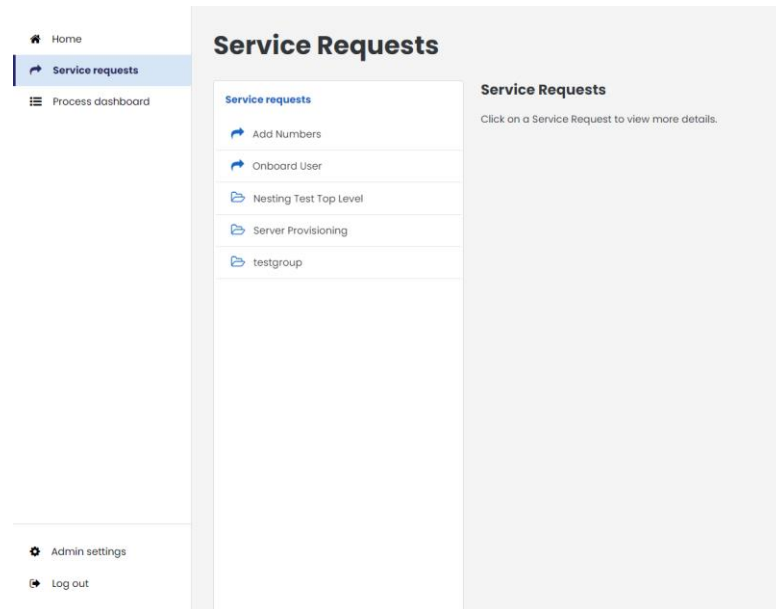
Logging in as an administrator user, they will be presented with a home page with extra options, as shown below.



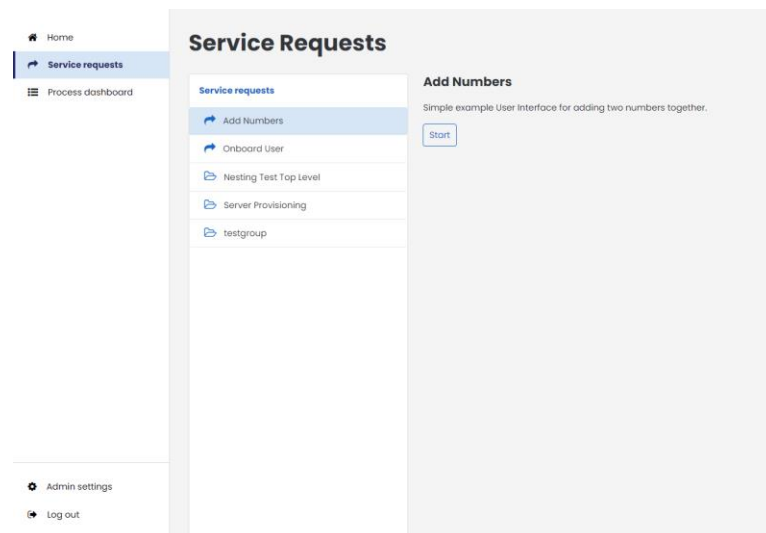
In addition to the Service Requests and Task Dashboard, administrator users may navigate to the Admin Settings page using the option in the bottom left corner, above the 'sign out' button.

4 Service Requests

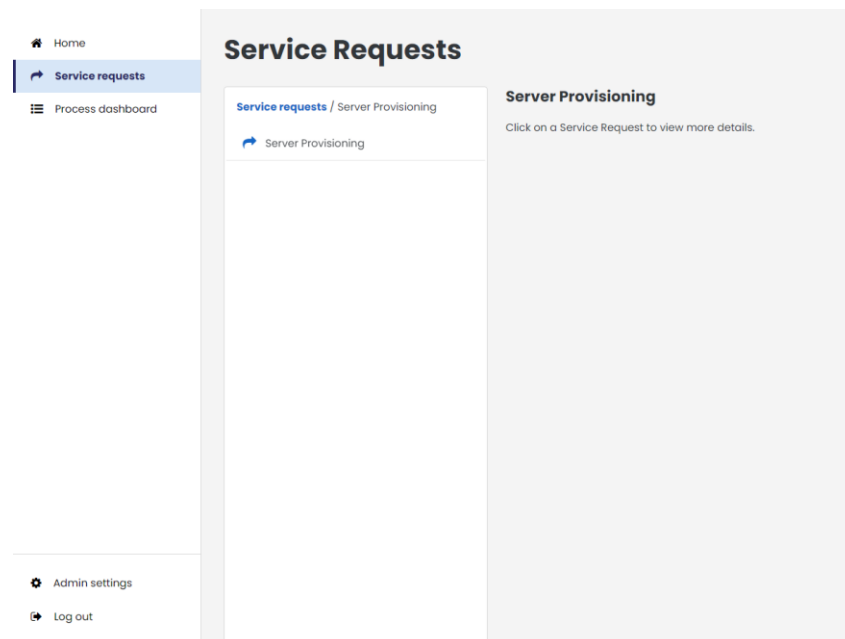
From the home page, select 'Service Requests'. The user will be presented with the following menu from which they may select an automated process to trigger manually.



Selecting a service request (designated by an arrow icon) will display details about the process that will be kicked off, as well as the option to start it.



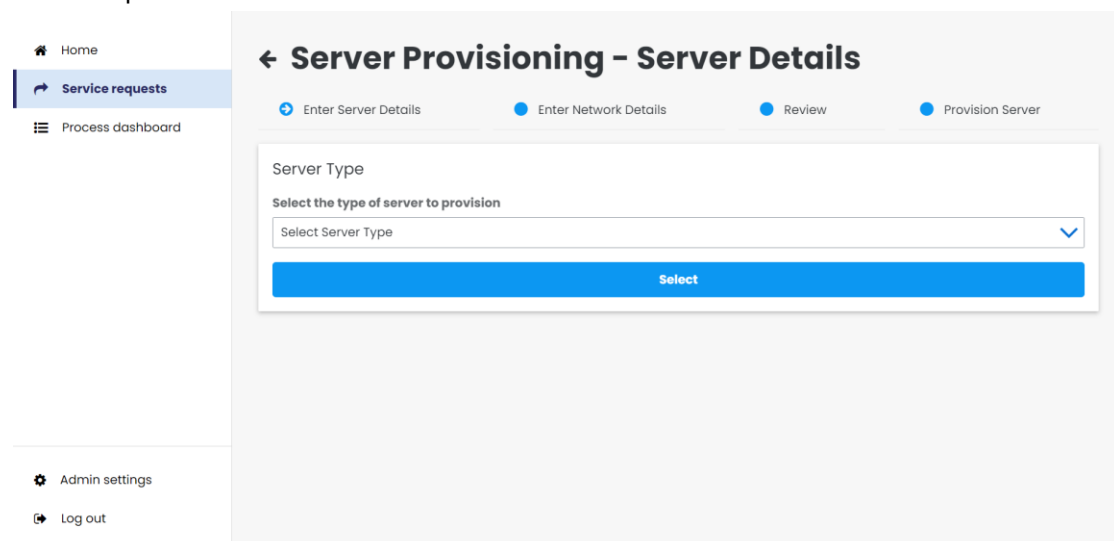
Selecting a group (designated by a folder icon) will display the contents of the group, either other sub-groups or service requests.



Note the breadcrumb component above the list of service requests. This allows a user to navigate up and down a complex group hierarchy.

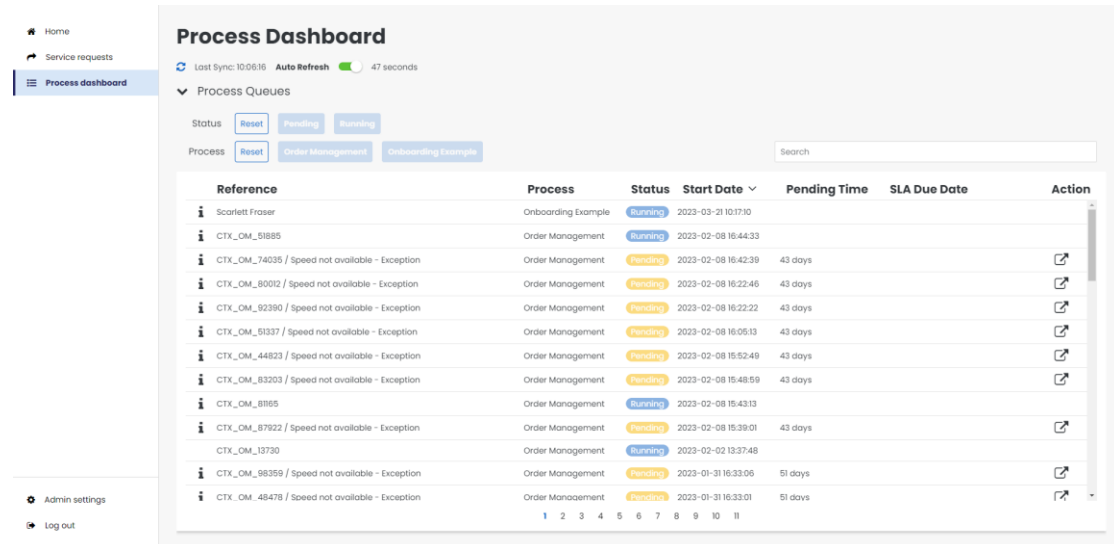
Selecting a service request, then 'Start' in the right-hand panel, will initiate the UI page associated with this service request, leading the user through whatever pages have been built for the UI-driven process.

For example:



5 Process Dashboard

From the home page, select 'Process Dashboard'. This will display to the user all user processes, either currently running or completed within 24 hours, that they have permission to view.
























The screenshot shows the 'Process Dashboard' interface. On the left is a sidebar with navigation links: Home, Service requests, and Process dashboard (selected). The main content area has a title 'Process Dashboard' and a status bar showing 'Last sync: 10:06:16', 'Auto Refresh' (checked), and '47 seconds'. Below this is a 'Process Queues' section with filters for Status (Reset, Pending, Running) and Process (Reset, Order Management, Onboarding Example). A search bar is also present. The main table displays process data with the following columns: Reference, Process, Status, Start Date, Pending Time, SLA Due Date, and Action. The table contains 15 rows of data, including processes like 'Scarlett Fraser', 'CTX_OM_51885', and 'CTX_OM_74035'. The bottom of the table has a pagination bar showing '1 2 3 4 5 6 7 8 9 10 11'.

Reference	Process	Status	Start Date	Pending Time	SLA Due Date	Action
i Scarlett Fraser	Onboarding Example	Running	2023-03-21 10:17:10			
i CTX_OM_51885	Order Management	Running	2023-02-08 16:44:33			
i CTX_OM_74035 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:42:39	43 days		
i CTX_OM_80012 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:22:46	43 days		
i CTX_OM_92390 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:22:22	43 days		
i CTX_OM_51337 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:05:13	43 days		
i CTX_OM_44823 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:52:49	43 days		
i CTX_OM_83203 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:48:59	43 days		
i CTX_OM_81865	Order Management	Running	2023-02-08 15:43:13			
i CTX_OM_87922 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:39:01	43 days		
CTX_OM_13730	Order Management	Running	2023-02-02 13:37:48			
i CTX_OM_98359 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:33:06	51 days		
i CTX_OM_48478 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:33:01	51 days		

Selecting the circular arrows next to the page title 'Process Dashboard' will refresh the data populating the page. Toggling 'Auto Refresh' to on will refresh the page every minute, with a countdown denoting the time until this occurs in seconds.

5.1 Process Execution View

The Process Execution View shows a table of processes currently executing or having completed within 24 hours.

Reference	Process	Status	Start Date	Pending Time	SLA Due Date	Action
 Scarlett Fraser	Onboarding Example	Running	2023-03-21 10:17:10			
 CTX_OM_51885	Order Management	Running	2023-02-08 16:44:33			
 CTX_OM_74035 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:42:39	43 days		
 CTX_OM_80012 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:22:46	43 days		
 CTX_OM_92380 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:22:22	43 days		
 CTX_OM_51337 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:05:13	43 days		
 CTX_OM_44823 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:52:49	43 days		
 CTX_OM_83203 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:48:59	43 days		
 CTX_OM_8165	Order Management	Running	2023-02-08 15:43:13			
 CTX_OM_87922 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:39:01	43 days		
CTX_OM_13730	Order Management	Running	2023-02-02 13:37:48			
 CTX_OM_88359 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:33:06	51 days		
 CTX_OM_48478 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:33:01	51 days		

From left to right, the columns are:

Column Name	Description
Logs	Select the 'i' icon to view the logs of the process execution so far.
Reference	The unique reference of this execution of the process, as well as a task name if a task is pending.
Process	The name of the process.
Status	The status that the process execution is currently in.
Start Date	The time at which the process execution began.
Pending time	If a task is pending, the length of time it has been pending for
SLA Due Date	If a task is pending, and it has an SLA Due Date, how many days are remaining until the SLA is breached.
Action	Select the icon to be taken to the UI configured for a pending task, so that it may be completed.

Each column may have its title selected, so that the table is sorted by its values, and specific records may be located using the search bar.

5.2 Filters

Above the Process Execution View are a set of filters. These are dynamically generated based on the statuses and processes available and allow the Process Execution View to be filtered based on what is selected.

The filter interface consists of two rows. The first row, labeled 'Status', contains a 'Reset' button and two buttons: 'Pending' and 'Running'. The second row, labeled 'Process', contains a 'Reset' button and two buttons: 'Order Management' and 'Onboarding Example'. All buttons are currently unselected.

For example, if the user wishes to see all Running or Cancelled executions of the 'Order Management' Process, then those filters should be selected as below:

The filter interface is shown with 'Pending' and 'Running' selected in the Status row, and 'Order Management' and 'Onboarding Example' selected in the Process row. The 'Reset' buttons remain unselected.

Selecting 'Reset' will deselect all filters in that row.

5.3 Queues

Above the filters, there is a collapsible menu allowing the user to navigate to dedicated 'queues' for each process configured, and for a set of pre-defined execution statuses.

Process Queues					Processes	
Status						
506	4	0	0	510	509	1
Pending	Running	Completed (24h)	Exception	Total	Order Management	Onboarding Example

These allow users with concern for a specific process to only see executions of that process if they wish, and administrators to see how processes are running, pending, completed, etc.

6 My Process Dashboard

From the home page, select 'My Process Dashboard'. This will display to the user all pending user interactions that they have permission to interact with.

Process Dashboard

Last Sync: 10:21:10 Auto Refresh 52 seconds

Process [Reset](#) [Order Management](#)

This view shows any Pending tasks you have permission to interact with. To view other process executions, select Process Dashboard.

Search

Reference	Process	Status	Start Date	Pending Time	SLA Due Date	Action
CTX_OM_74039 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:42:39	43 days		View
CTX_OM_80002 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:22:45	43 days		View
CTX_OM_92390 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:22:22	43 days		View
CTX_OM_93337 / Speed not available - Exception	Order Management	Pending	2023-02-08 16:05:13	43 days		View
CTX_OM_44823 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:52:49	43 days		View
CTX_OM_83203 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:48:59	43 days		View
CTX_OM_87922 / Speed not available - Exception	Order Management	Pending	2023-02-08 15:39:01	43 days		View
CTX_OM_98399 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:33:06	51 days		View
CTX_OM_48478 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:33:01	51 days		View
CTX_OM_47714 / Speed not available - Exception	Order Management	Pending	2023-01-31 16:32:58	51 days		View
CTX_OM_48986 / CMS Exception - Exception	Order Management	Pending	2023-01-31 16:32:55	51 days		View
CTX_OM_41554 / Speed not available at ordered price - Exception	Order Management	Pending	2023-01-31 16:32:53	51 days		View
CTX_OM_78536 / Speed not available at ordered price - Exception	Order Management	Pending	2023-01-31 16:32:50	51 days		View
CTX_OM_31889 / No response from vendor when checking for confirmation - Exception	Order Management	Pending	2023-01-31 16:32:48	51 days		View

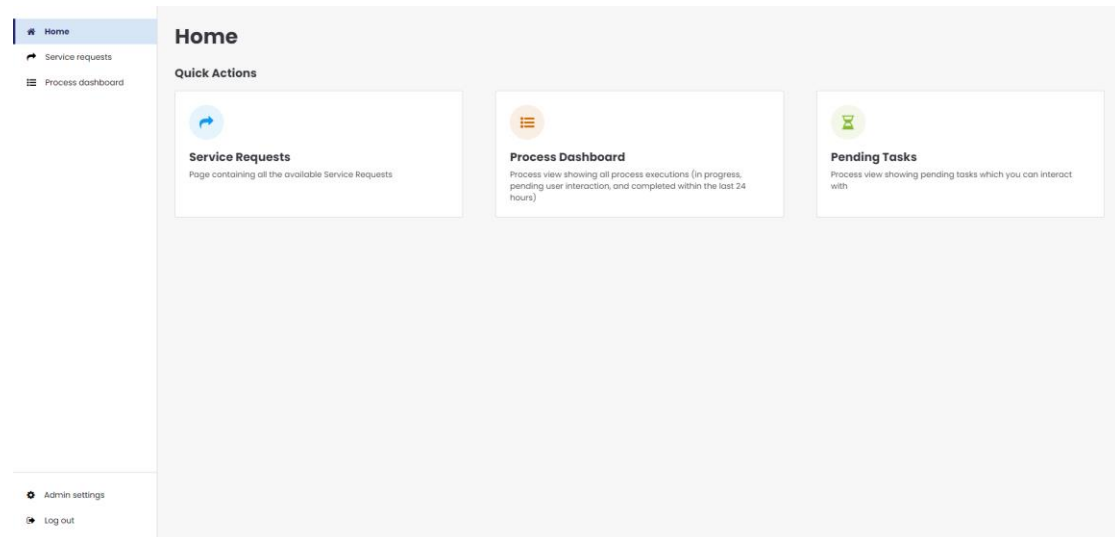
1 2 3 4 5 6 7 8 9 10 11

Admin settings Log out

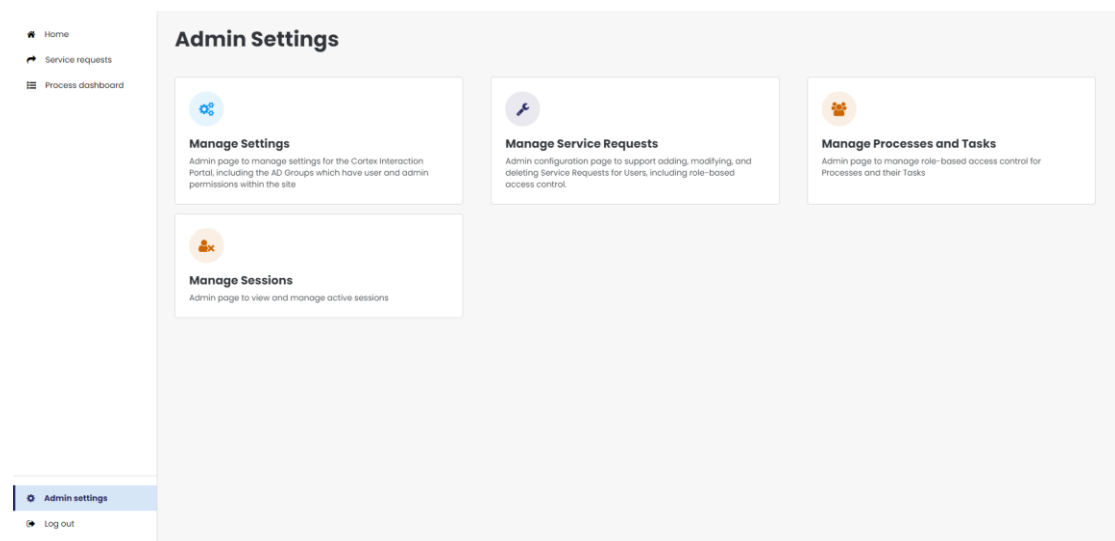
This is like the Process Dashboard, except simplified to be relevant to the logged in user and only show them tasks that they need to complete. They have the same Process Execution View, but may only filter based on the process being executed and have no need to navigate to other queues from here.

7 Administrator Settings

Logging in as an administrator user, the user will be presented with a home page with extra options, as shown below.



Selecting 'Admin Settings' in the bottom left corner, will navigate to the following page:



7.1 Manage Service Requests

From the Admin Settings page, select 'Manage Service Requests'. A page similar to the service request catalogue will be displayed, with the right-hand panel allowing users to manage the available requests.

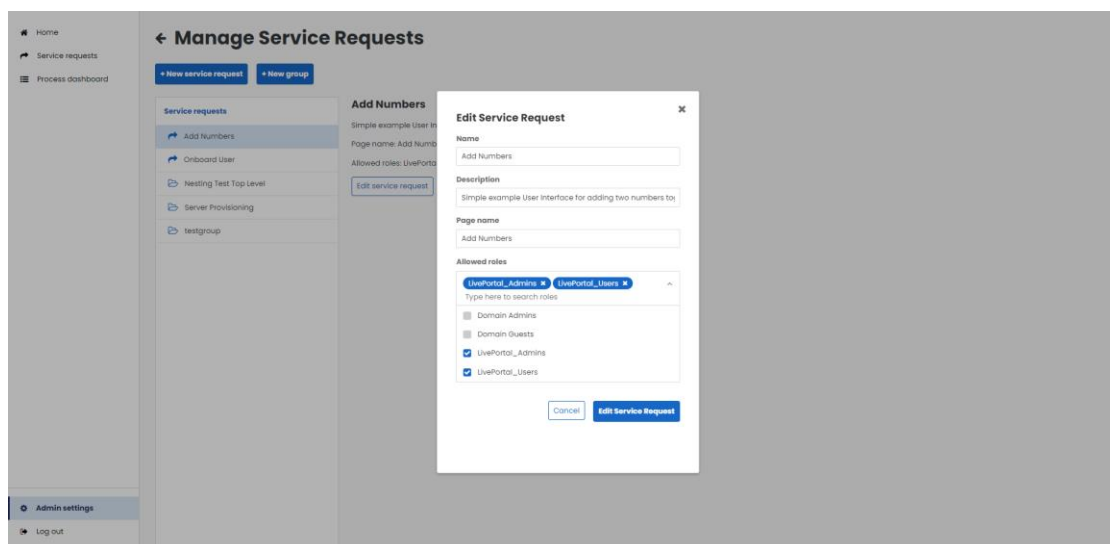
7.1.1 Create Service Request

 To create a service request and map it to a newly created page, see the *Cortex Interaction Portal Guidance and Best Practices* document Section 2.1.

7.1.2 Edit Service Request

To modify a pre-existing service request, select it and then 'Edit Service Request'.

The user will be presented with a pop-up window that allows them to change the details of the service request.

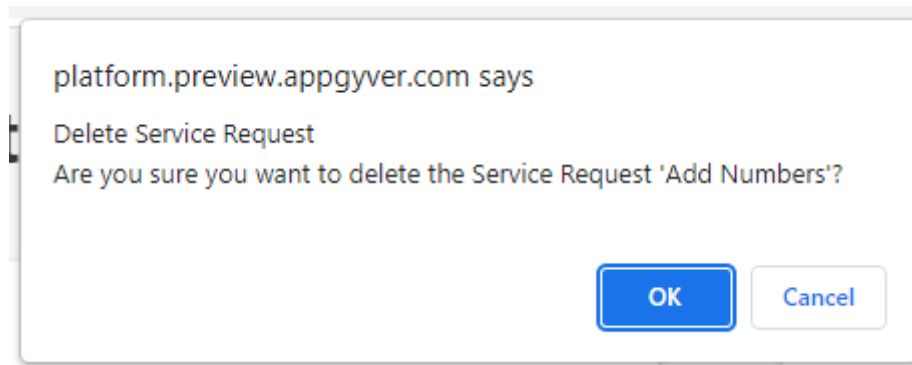


Once the details have been changed, select 'Edit Service Request' to save them or the X button in the top right corner to cancel.

7.1.3 Delete Service Request

To delete a pre-existing service request, select it and then the red 'Delete Service Request' button.

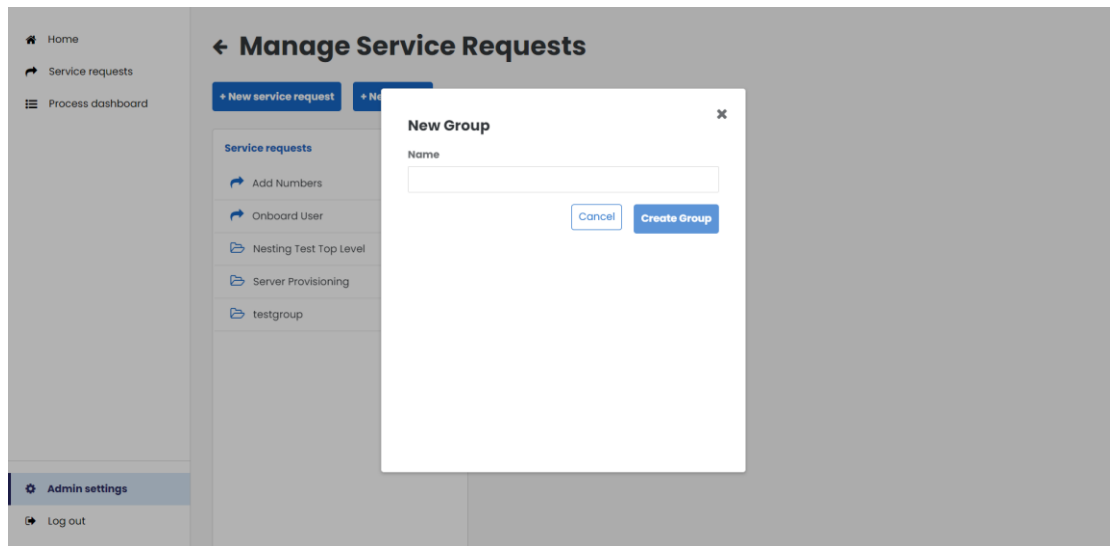
A pop-up will be shown to ensure that the user is sure they wish to delete the service request.



Select 'OK' to delete the service request, or 'Cancel' to cancel.

7.1.4 Create Group

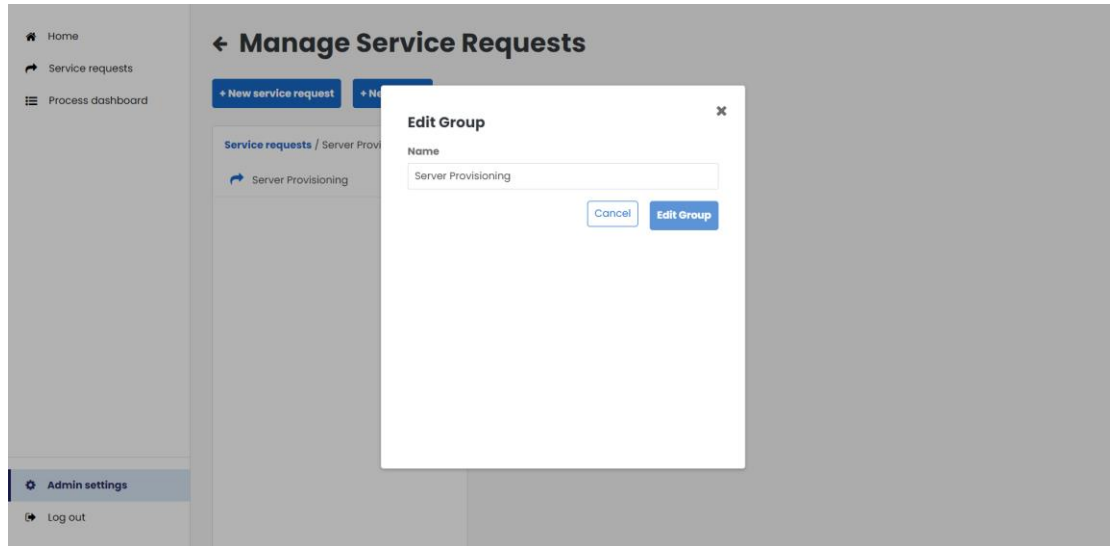
To create a service request group, select 'New Group' above right-hand panel. The below pop-up window will be shown to the user.



The name of the group may be configured here. Select 'Create Group' to create the group.

7.1.5 Modify Group

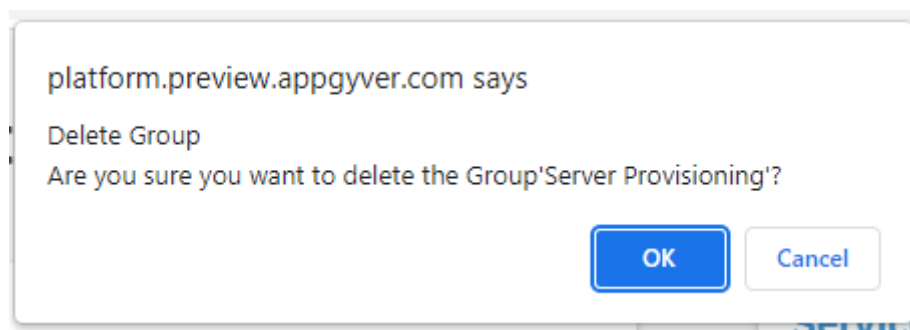
To modify a pre-existing group, select it to navigate inside. Select 'Modify Group' to open the pop-up window allowing it to be modified.



Once the details have been changed, select 'Edit Group' to save them or the X button in the top right corner to cancel.

7.1.6 Delete Group

To delete a pre-existing group, select it and then the red 'Delete Group' button. A pop-up will be shown to ensure that the user is sure they wish to delete the group.



Select 'OK' to delete the group, or 'Cancel' to cancel.

7.2 Manage Settings

From the Admin Settings page, select 'Manage Settings'. From the page to which the user is taken, they may edit various settings of the Cortex Interaction Portal web app.

Home

Service requests

Process dashboard

Admin settings

Log out

← Manage Settings

Manage settings for the Cortex UI including role-based access control.

Allowed roles

Note that these roles are Active Directory Groups which are allowed access to the system. User Roles manages the users who can access the application, including the Service Requests and Processes pages, while Admin Roles are users who can update Settings and Service Requests, as well as access all other pages within the application. Permissions to individual Service Requests or Processes are managed within the Service Requests Configuration.

User roles

Domain Guests × LivePortal_Admins × LivePortal_Users ×

Type here to search user roles

☐ Access Control Assistance Operators

☐ Account Operators

☐ Administrators

☐ Allowed RODC Password Replication Group

Admin roles

Domain Admins ×

Type here to search admin roles

☐ Access Control Assistance Operators

☐ Account Operators

☐ Administrators

☐ Allowed RODC Password Replication Group

Session details

Session timeout

220 minutes

The timeout period (in minutes) after logging in for which a user will be automatically logged out. Please use the slider to choose a value between 20 and 480 minutes.

Undo changes

Save changes

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10/04/2023
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7.2.1 Manage Allowed Roles

In the upper-most panel, an administrator may search for user groups in active directory and assign them as a user or an admin.

Allowed roles

Note that these roles are Active Directory Groups which are allowed access to the system. User Roles manages the users who can access the application, including the Service Requests and Processes pages, while Admin Roles are users who can update Settings and Service Requests, as well as access all other pages within the application. Permissions to individual Service Requests or Processes are managed within the Service Requests Configuration.

User roles

Domain Guests ✕
LivePortal_Admins ✕
LivePortal_Users ✕

Type here to search user roles

☐ Access Control Assistance Operators
☐ Account Operators
☐ Administrators
☐ Allowed RODC Password Replication Group

Admin roles

Domain Admins ✕

Type here to search admin roles

☐ Access Control Assistance Operators
☐ Account Operators
☐ Administrators
☐ Allowed RODC Password Replication Group

Once changes have been made, select the save button at the bottom of the screen to apply them.

7.2.2 Manage Session Details

In the bottom-most panel, an administrator may change the period of time between a user logging in and when they are automatically logged out.

Session details

Session timeout

220 minutes

The timeout period (in minutes) after logging in for which a user will be automatically logged out. Please use the slider to choose a value between 20 and 480 minutes.

Once changes have been made, select the save button at the bottom of the screen to apply them.

7.3 Manage Processes and Tasks

When working with Process Driven UIs, (i.e., otherwise fully automated processes that will wait for a manual task involving an AppGyver UI to be completed before continuing) it is often necessary to show different tasks to users with different permissions.

For example, in a process involving multiple departments, users from each department may be required to enter data at different points in an automated process's execution, so they would only need permissions to see tasks relevant to them. Then, when all data has been entered, a senior manager may need to provide approval for the process to be finalised.

To define processes, tasks, and their associated access, select 'Manage Processes and Tasks' from the Admin Settings page.

The below screen will be displayed:

Manage Processes and Tasks Sync Last synced 24/03/2023 10:31

[+ New Process](#)

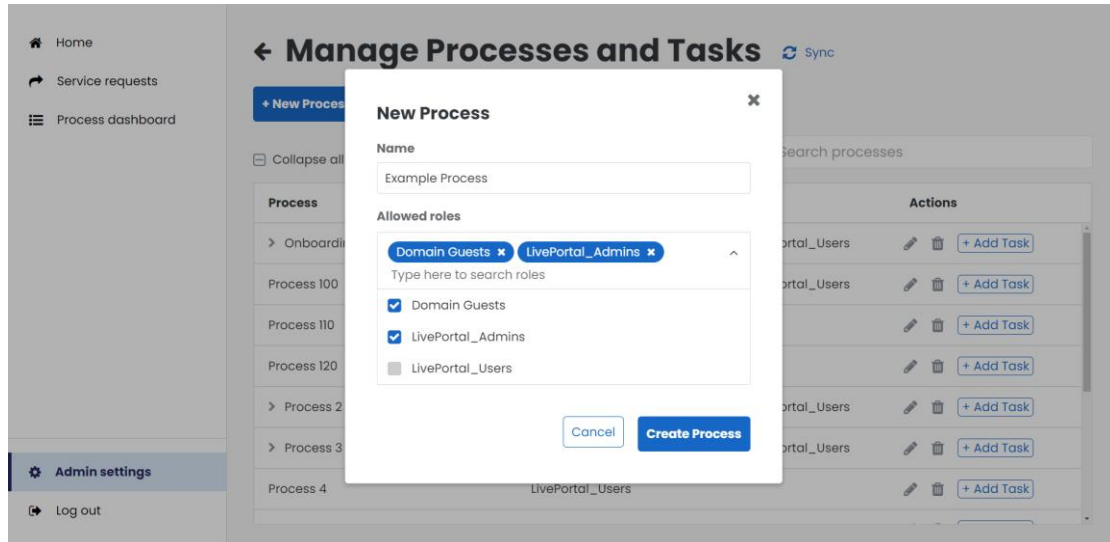
☐ Collapse all ☐ Expand all

Process	Allowed roles	Actions
> Onboarding Example	Domain Guests, LivePortal_Admins, LivePortal_Users	+ Add Task
Process 100	Domain Guests, LivePortal_Admins, LivePortal_Users	+ Add Task
Process 110	Domain Guests, LivePortal_Admins	+ Add Task
Process 120	Domain Guests, LivePortal_Admins	+ Add Task
> Process 2	Domain Guests, LivePortal_Admins, LivePortal_Users	+ Add Task
> Process 3	Domain Guests, LivePortal_Admins, LivePortal_Users	+ Add Task
Process 4	LivePortal_Users	+ Add Task
> Process 5	LivePortal_Users	+ Add Task
> Process 6	LivePortal_Users	+ Add Task
Process 7	LivePortal_Users, LivePortal_Admins, Domain..	+ Add Task
> Process 8	LivePortal_Users, LivePortal_Admins, Domain..	+ Add Task
> Process 9	LivePortal_Users, LivePortal_Admins, Domain..	+ Add Task
> Test Process	Domain Guests, LivePortal_Admins	+ Add Task

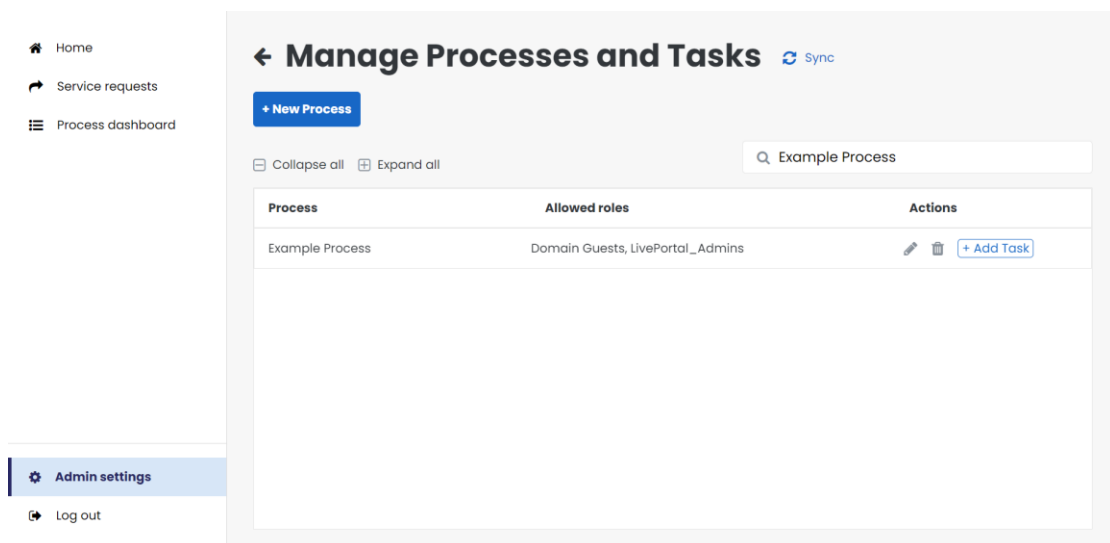
Admin settings [Log out](#)

7.3.1 Define a New Process

Select 'New Process', then in the panel that appears enter a name and select active directory groups that will have permission to view one or more tasks within that group.

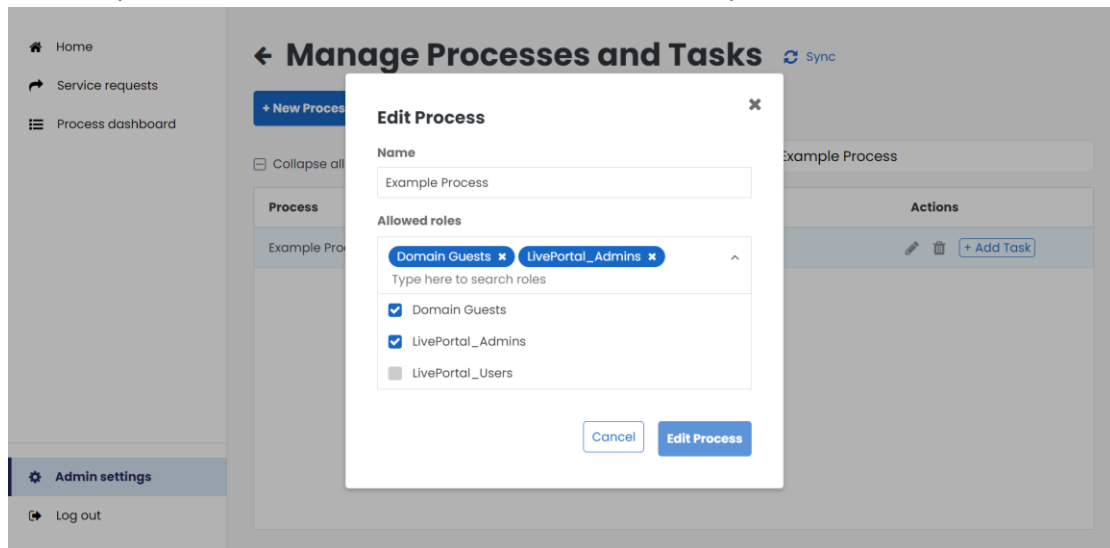


Select 'Create Process' to create the process, or the X button in the top right corner to cancel. A new process will be in the list below.



7.3.2 Edit a Process

Locate a process in the list. Select the edit button next to the process.



The process name and user groups may be changed here. Select 'Confirm' to apply the change, or the X button in the top right corner to cancel.

7.3.3 Delete a Process

The process may also be deleted here. To do this, select the bin icon next to the process. A pop-up will be shown to ensure that the user is sure they wish to delete the process.

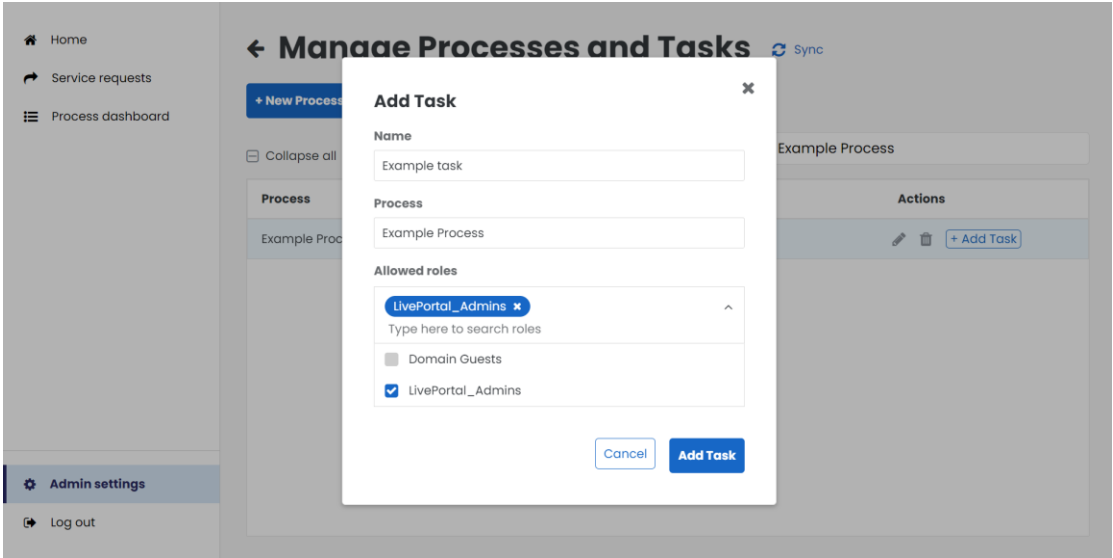
Are you sure you want to delete this process?



Select 'OK' to delete the process, or 'Cancel' to cancel. The process will have been removed from the list.

7.3.4 Add Tasks to a Process

Locate a process in the list. Select the '+ Add Task' button next to the 'Tasks' header.



In the pop-up window that appears, administrators may add a task to the process. If a task with this name is raised by a Cortex flow, then only the user groups that have access to it can interact with the task.

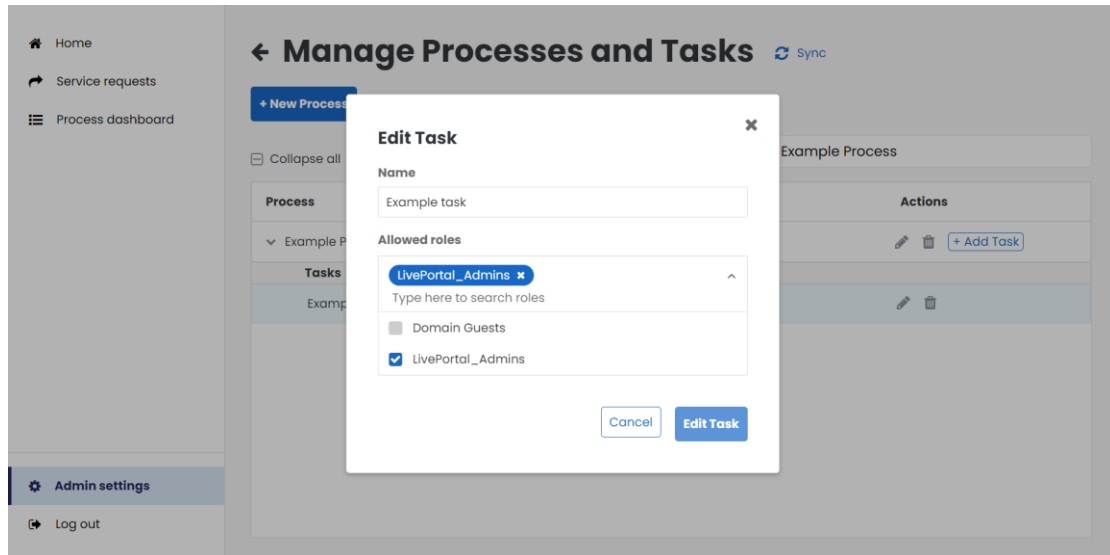
These user groups can be selected from the list of groups that were selected for the process as a whole in Section 7.3.1

Select 'Add Task' to apply the changes, or the X button in the top right corner to cancel. The task will be present under the process.

Process	Allowed roles	Actions
Example Process	Domain Guests, LivePortal_Admins	+ Add Task
Tasks		
Example task	LivePortal_Admins	

7.3.5 Edit a Task

Locate a process in the list. Select the edit button next to the process.



The task name and user groups may be changed here. Select 'Confirm' to apply the change, or the X button in the top right corner to cancel.

7.3.6 Delete a Task

The task may also be deleted here. To do this, select the bin icon next to the task. A pop-up will be shown to ensure that the user is sure they wish to delete the task.

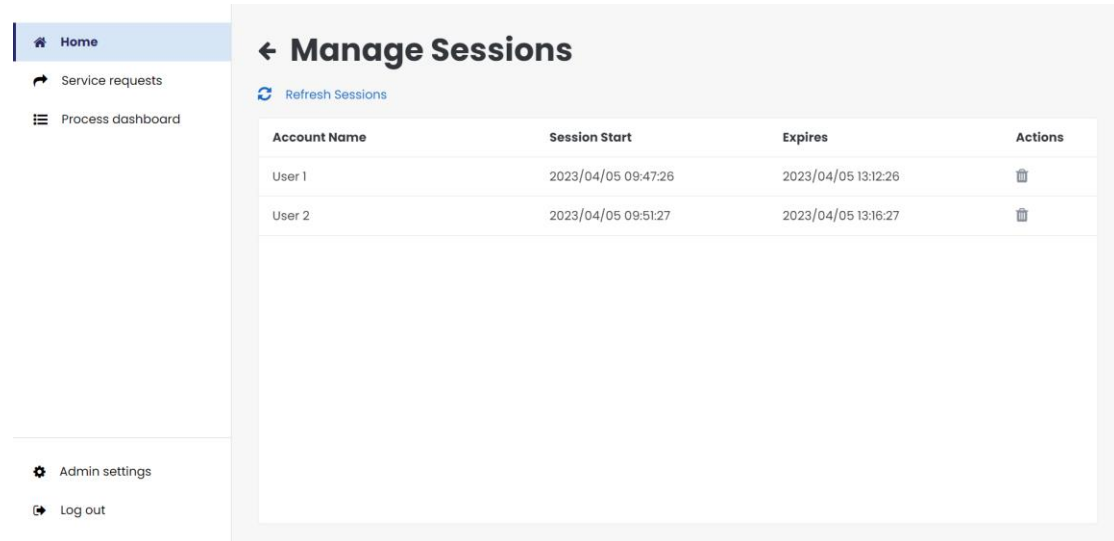
Are you sure you want to delete this task?



Select 'OK' to delete the task, or 'Cancel' to cancel. The task will have been removed from the list.

7.4 Manage Sessions

To manage sessions, select 'Manage Processes and Tasks' from the Admin Settings page.



Manage Sessions

[Refresh Sessions](#)

Account Name	Session Start	Expires	Actions
User 1	2023/04/05 09:47:26	2023/04/05 13:12:26	
User 2	2023/04/05 09:51:27	2023/04/05 13:16:27	

From here, administrators may view the currently logged in users, and if necessary, terminate their sessions early, logging them out.