Cortex Service Request Catalog User Guide

Cortex Limited
Keypoint
17-23 High Street
Slough
Berkshire
SL1 1DY
United Kingdom
T +44 (0) 1753 513 980
E info@cortex.co.uk

Status: 1.0

Release Date: 16/10/2020

Author: Marc Tonen

Document Version: 1.0

Contents

Preface

1.1 About this Manual

This document provides an overview of how to use the Cortex Service Request Catalog module, along with details of the components.

1.2 Related Material

- Cortex Service Request Catalog - Deployment Plan

2 Versions

2.1 Document Revisions

The following revisions have been made to this document

Date	Revision	Notes
16/10/2020	0.1	Initial version and Release

3   Requirements

The CTX-Manual-Intervention module requires the following:

- Cortex Material Design Subtasks
  - Cortex Material Design Subtasks (available on GitHub, see the deployment plan)
- CTX-Configuration Module
  - CTX-Configuration Database Deployed on DB Server
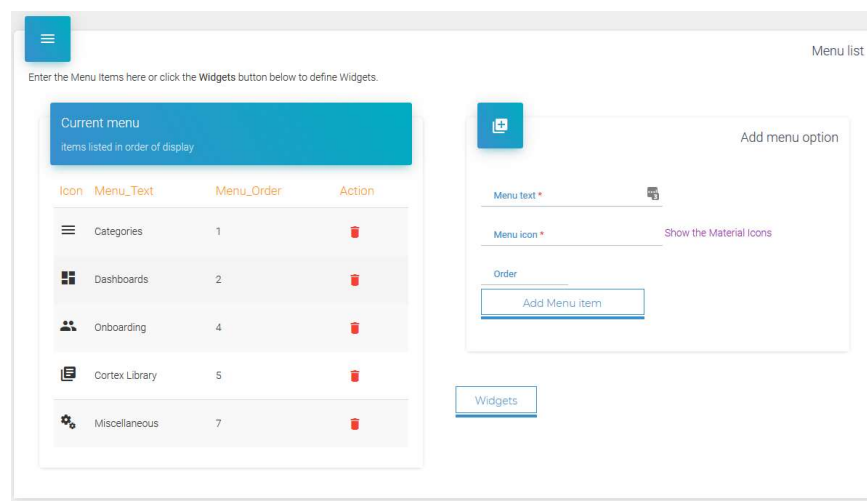
4 Cortex Service Request Catalog Overview

In the following paragraphs a description of the Cortex Service Request Catalog module and how it can be configured.

The main objective of the Cortex Service Request Catalog is to allow an easy access for end users to automation (flows) and hyperlinks. The dashboard is constructed by means of html and using the Cortex Material Design styling. For not having to write html a management module has been created.

4.1 CTX-MDS-Service-Request-Catalog-Mgt

This module is designed to be used for configuring the main Service Request Catalog. It consists out of 3 steps.

4.1.1 Step 1 – define Menu Items

This step allows you to create new menu items. The menu is a single level menu (it cannot be expanded).

- **Menu Title**

    Enter a Menu title. Our advice is to use a maximum of 30-32 characters.

- **Menu icon**

    Enter here the name of any of the Google Material Design icons that can be accessed clicking the 'Show the Material Icons' text. That will open in a new tab where all available icons can be found.

In the screen grab above remember or copy the text "alarm" into the corresponding field in the management module.

- **Order**

    Use this field to set the order where the new menu item should be placed. This should be numerical value. If no value is entered it will be added to the end of the list. In the example screen image above under 4.1.1.1 if a new menu item is to be placed between "Categories" and "Dashboards" enter the value 2, the current value of the Dashboards menu item and the system will position the new menu item at that position, automatically moving the other items.

- **Add Menu Item - button**

    To save the new menu item, click the Add Menu Item button which will cause the page to refresh itself.
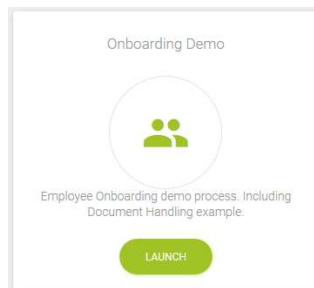
- **Delete icon**

    If you made a mistake and need to remove a menu item, then simply click the red delete icon. This will cause the menu item to immediately be removed and the page is refreshed again.
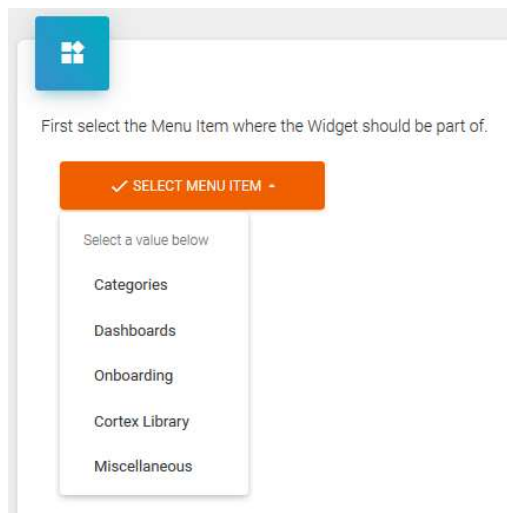   **Note:** there will be no "Are you sure…" confirmation message.

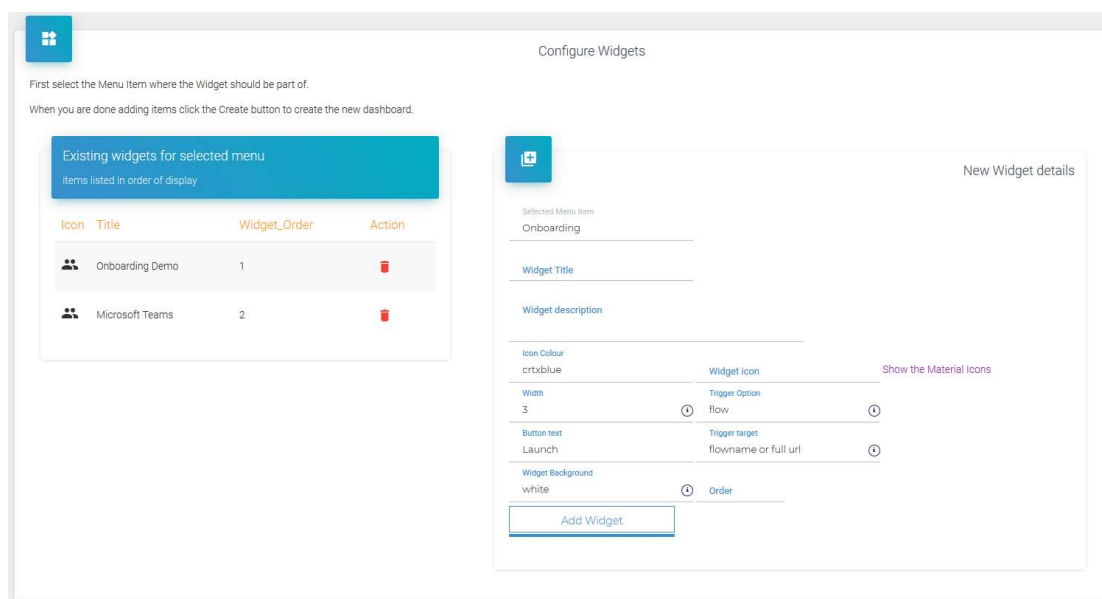## 4.1.2   Step 2 – Configure Widgets

This step allows you to create new Widgets. A widget is a component that will be displayed on the main part of the Cortex Service Request Catalog page.

Before entering the Widget details select from the "Select Menu Item" drop down the menu where the Widget should be part of:

Once the selection is made the current widgets, part of that menu, will be displayed on the left-hand side of the page. Next, enter the details of the widget.

- **Widget Title**

  This is the title text that will be displayed at the top of the widget

- **Widget description**
  This is the text that will be displayed right underneath the icon located in the middle of the widget.

- **Icon colour**
  Specify the colour of the icon and the button. Either one of the following can be entered: crtxblue, crtxgreen, crtxorange, crtxindigo, info, primary, success, warning, danger, rose.

- **Widget Icon**

  Like the Menu Icon, the Widget icon can also be any of the Google Material Design icons that can be accessed clicking the 'Show the Material Icons' text. That will open in a new tab where all available icons can be found.

- **Width**
  Although the width can be set to any of the responsive values (1 – 12) it is advised that this should be either 2 or 3 (default).

- **Trigger Option**
  enter here either "flow" to have an existing flow launched. Or enter "url" if an external webpage needs to be opened.

- **Button Text**
  The text to be displayed on the button located at the bottom of the widget. The default value is "Launch"

- **Trigger Target**
  This works in conjunction with the Trigger Option field. In Case a flow is to be launched, enter here the Flow Name of that flow. In case a url needs to be launched enter the full url here (including http:// or https://)

- **Widget background**
  This will determine the background of the widget. Use either white (the default value) or transparent.

- **Order**
  Use this field to set the order where the new widget should be placed. This should be numerical value. If no value is entered it will be added to the end of the list.

- **Add Widget - button**

  To save the new menu item, click the Add Menu Item button which will cause the page to refresh itself.

- **Delete icon**

  If you made a mistake and need to remove a widget, then simply click the red delete icon. This will cause the widget to immediately be removed and the page is refreshed again.
  Note: there will be no "Are you sure…" confirmation message.

4.1.3   Step 3 – Create (html)

This is an important step as the Create process will create a html file in the LivePortal folder structure which is read by the Cortex Service Request Catalog flow. The reason for creating a html file is for speed of loading the Cortex Service Request Catalog flow.

After you clicked the Create button, the file will be created, and you will be taken back to the Add Menu item page from where you can exit the process flow.