

Cora Orchestration Portal Overview

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The Cora Orchestration portal is built on cutting edge latest React technology, which enables new functionality and easy customizations to the portal.

The UI is simple, and organized with the single-page application approach. You get a unified case management working area, which is accessible in one place, based on your role(s).

For operations purposes, you can sign in to the portal as an Operations Manager, a Team Leader, or a Team Member. Each role has access to different data and information.

NOTES

- The portal is released as a *BETA* version. This means that you can develop on it, but it's not yet ready for production.
- Runtime forms, Analytics dashboards (based on FusionCharts), and portal grids (based on Kendo UI for jQuery) remain in their previous technology.

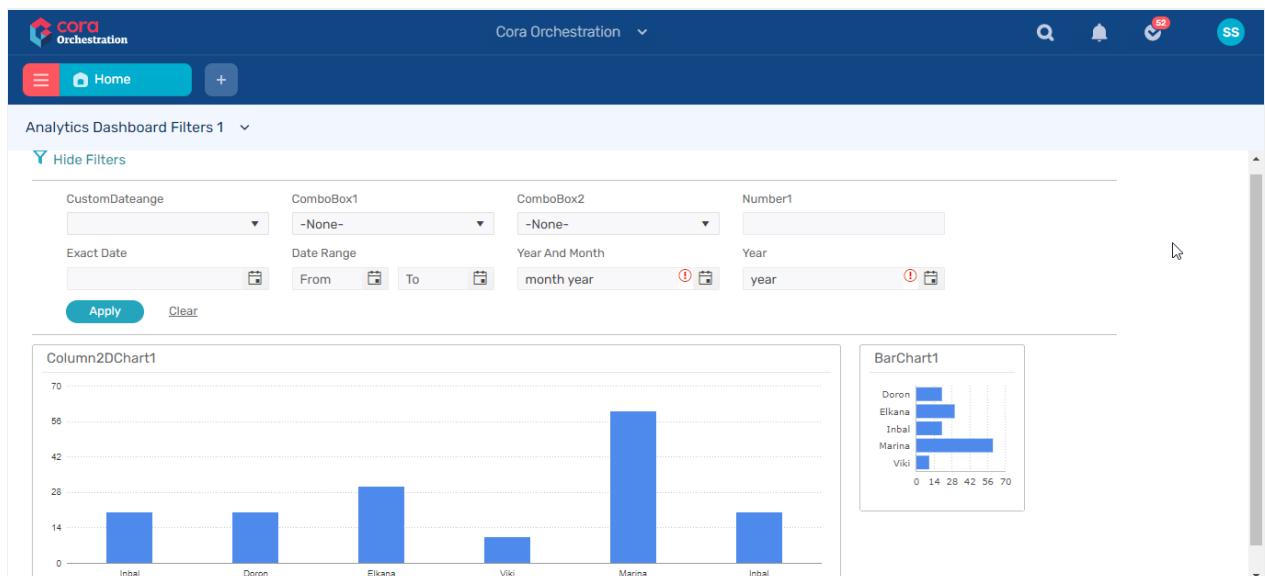


[Watch a demo](#) based on an underwriting business scenario.

Home

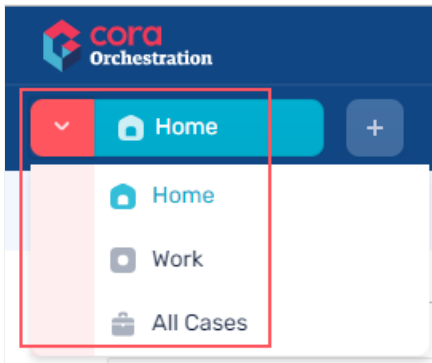
As you sign in to the portal, the Home page is the first page you land on. On the Home page you can view the out-of-the-box analytics dashboards, which are displayed per your role(s) and permissions.

For an optimal portal experience, we recommend that each user has permissions for at least one analytics dashboard.



For more details on creating and managing analytics, see [this article](#).

From anywhere in the portal, you can click **Home** to return to the Home page.



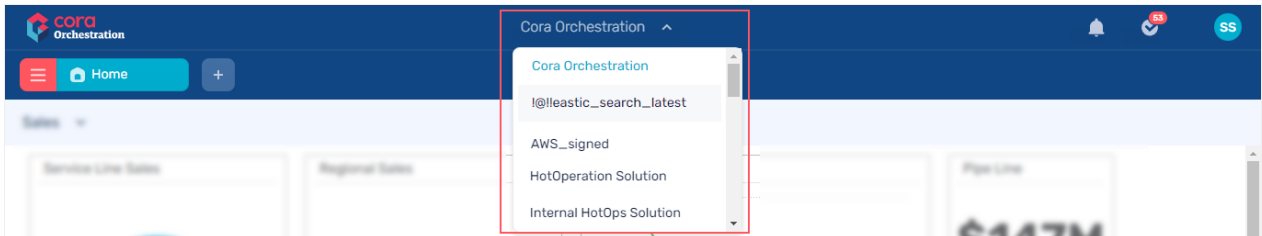
Besides Home, the main menu includes the following options: Work and All Cases.

General functionality

Among other things, from the Home page, you can select solutions, access your tasks, and search for cases or tasks.

Select a solution

Cora Orchestration is the default solution with basic orchestration functionality for all non-HotOperation cases. Users that are part of a HotOperations solution, can choose from a list of available solutions. The selection is saved in the user's last portal state.

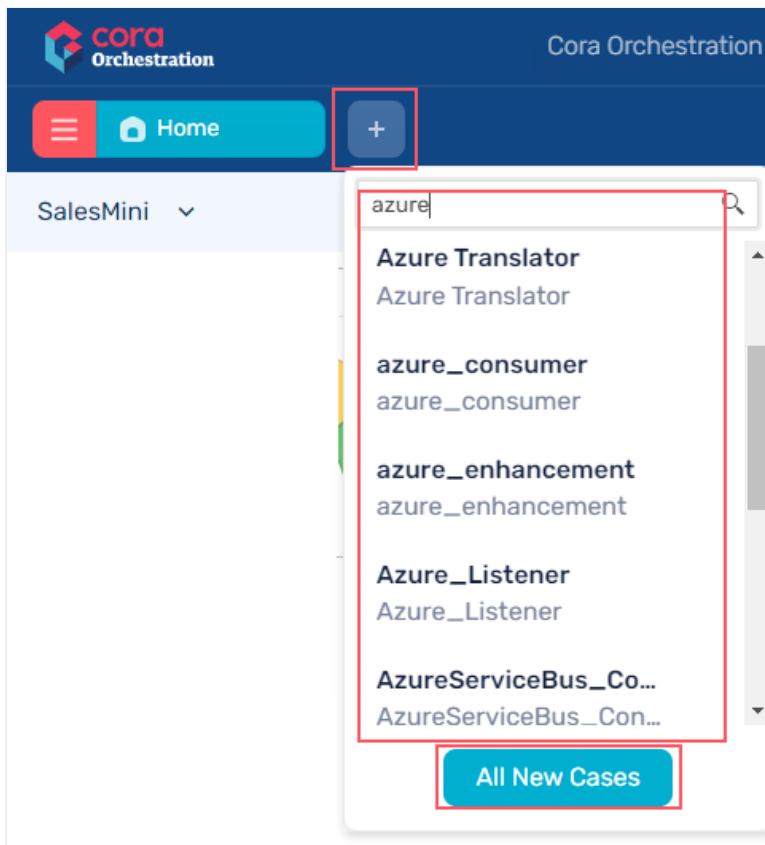


Create a case

You can create cases from the Home page.

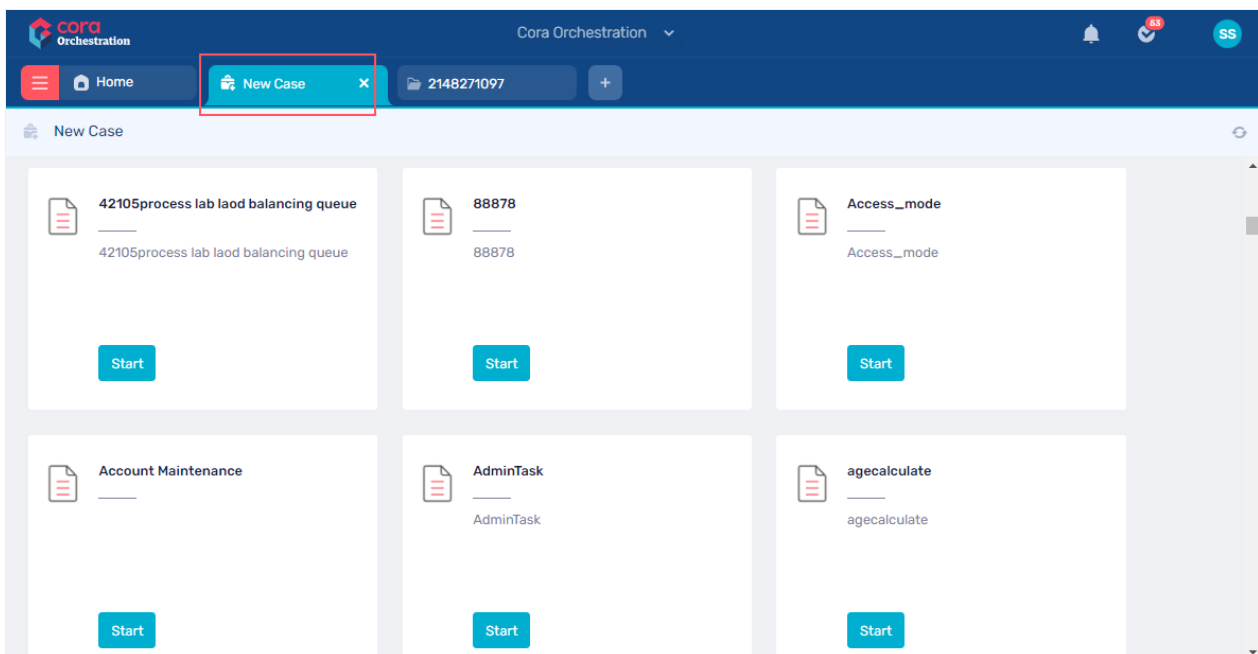
To create a new case:

1. Click the **+** button next to Home.
A list of the cases to which you have permission to create appears.
2. Select the case for which you want to create an instance.



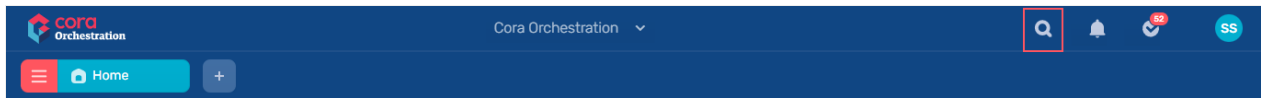
A new case opens in a new tab next to the Home tab.

The **All New Cases** option in the case list opens a new tab that displays all the cases for which you have permission to start.



Search cases

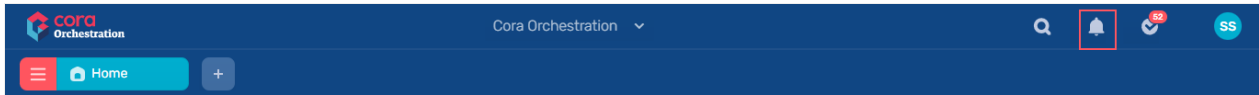
You can configure the search functionality, and enable or disable it per requirement. When search is configured, the Search icon displays at the top-right side of the window.



To search for cases, enter an ID number.

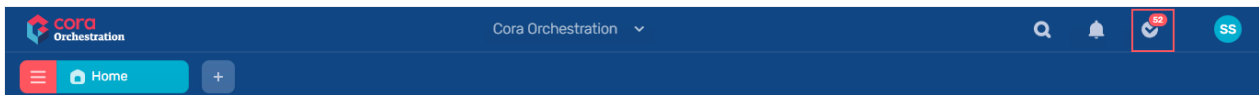
View notifications

The bell icon at the top-right side of the screen displays all your case and task-related notifications.



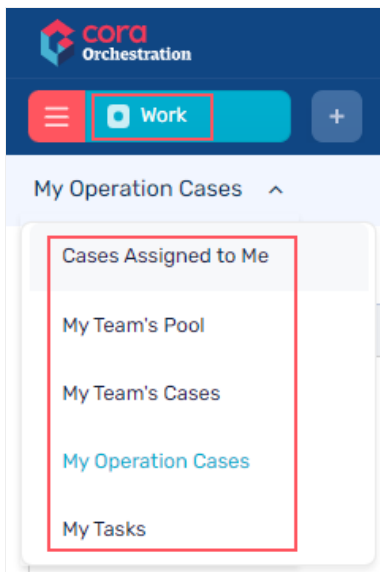
My Tasks shortcut

The check mark icon next to Notifications is the My Tasks shortcut. You can click it to view a list of all the tasks assigned to you.



Work

Based on your role, you can view and handle cases and tasks in the portal. The case and task details displayed depend on your permissions.



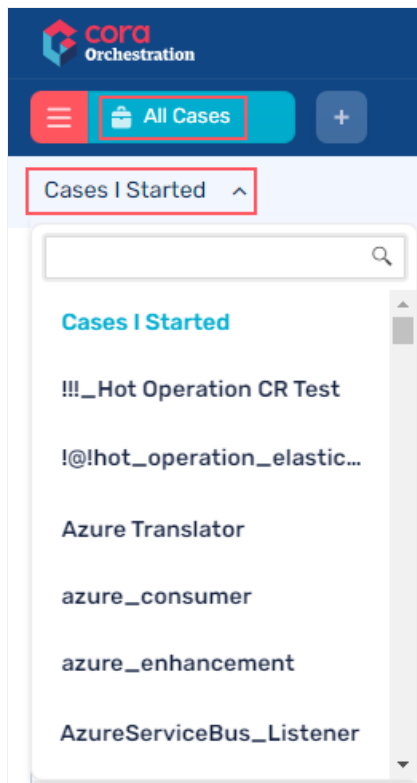
- The Work menu displays My Tasks and the HotOperations module options based on the selected solution.
- For the Cora Orchestration solution, you only have the My Tasks option. My Tasks are the tasks created by you or assigned to you.

For systems that include HotOperations, you can have the following options, based on your role(s):

Role	Menu option	Description
Team member	Cases Assigned to Me	Cases fetched by or assigned to team member.
	My Team's Pool	Cases assigned to the team member's role in the team.
Team Leader	My Team's Cases	Cases assigned to the team leader's team(s).
Operations Manager	My Operation Cases	Cases allocated to the Operations Manager's operation.

All Cases

Based on your role, the All Cases menu displays a list of the cases you have started and the cases you have view permissions for.



Grid filtering

You can filter all the grids in the portal and track the changes that happened to the data after applying filters.

The grid filters are configurable. For details, see [this article](#).

What's coming in the next phase?

- Multilanguage
- Delegations

- [Manage Sharing](#)
- [Portal customizations](#)
- [Contact Us and Privacy Policy](#)