



AUTOMATION PORTAL

Operator Guide

Version 4.6.3

Kelverion Automation Portal

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Introduction

The *Kerverion Automation Portal* is an easy to implement self-service front end for your automation solutions. It offers a versatile interface without the lengthy list of prerequisites required by other self-service portals available today.

The Automation Portal ethos is to *keep things simple and flexible*. The portal complements existing Automation platforms and does not attempt to replicate the automation platforms capability. Integration with the automation tools takes place via the Kerverion Automation Portal REST API with the support of Kerverion integrations for Automation Portal.

The Automation Portal was designed with *System Center Orchestrator and Azure Automation* in mind; however, it equally complements any automation platform or scripting language that can read and write to the Automation Portal database or that can use REST web services.

The Automation Portal is simple to implement, but more importantly it is easy for your end users to navigate, and by adding a simple web interface to your solutions you can allow users to easily interact with your automated solutions.

Accessibility Statement

The [Web Content Accessibility Guidelines \(WCAG\)](#) defines requirements for designers and developers to improve accessibility for people with disabilities. It defines three levels of conformance: Level A, Level AA, and Level AAA. The Automation Portal is partially conformant with WCAG 2.1 level AA.

Important: The Automation Portal provides features to customize themes and colors. Making changes to themes and colors may result in the Automation Portal no longer conforming to WCAG requirements.

Getting Started

Logging In

Active Directory

Login to the Kolverion Automation Portal from your web browser.

1. Open a web browser and go to URL provided by your portal administrator.
2. Enter your domain credentials if prompted.

Note: Depending on domain policy you may not be prompted for your domain credentials.

Entra ID

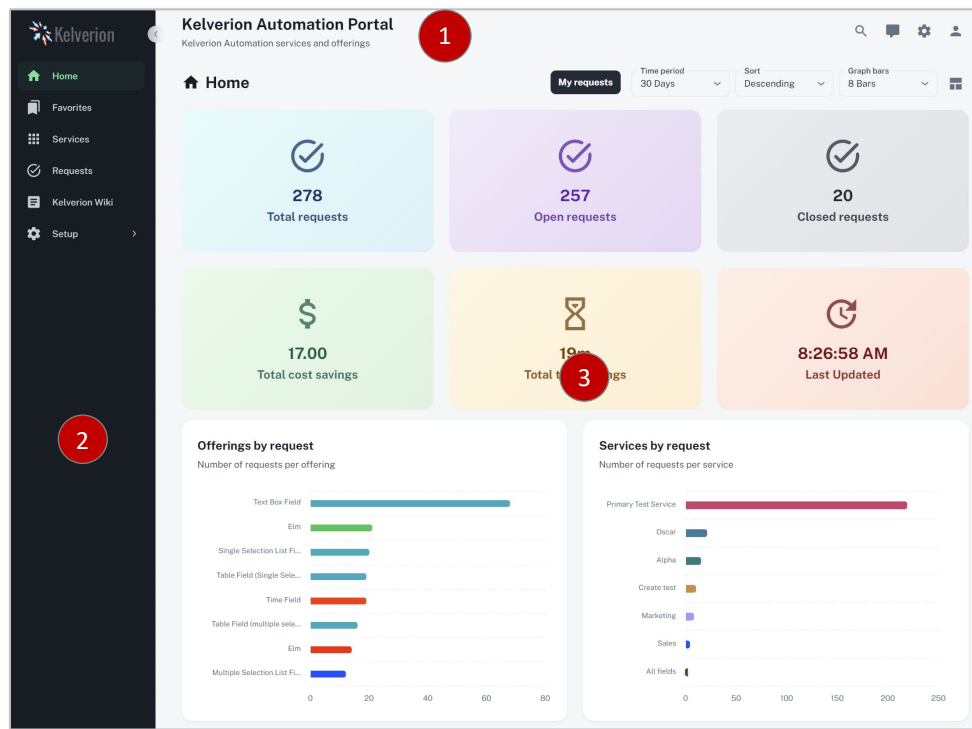
Login to the Kolverion Automation Portal from your web browser using your Microsoft Entra ID account.

1. Open a web browser and go to URL provided by your portal administrator.
2. On the **Login** page, click **Login**.
3. Enter your Microsoft Entra ID credentials.

Overview of the User Interface

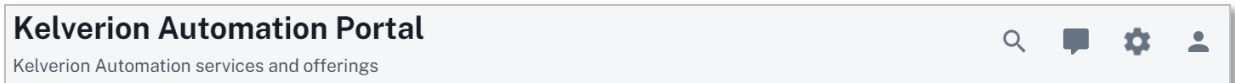
The Kolverion Automation Portal user interface is composed of three main sections.

1. The **Application bar** is located at the top of the user interface and provides access to search, feedback and help, display settings and your user profile.
2. The **Navigation bar** appears on the left side of the user interface by default and provides access to all available pages.
3. The **Content** view takes up the remaining space of the user interface and displays the pages of the portal, including your home page, services, offerings, and requests.



Application Bar

The **application bar** appears at the top of the Automation Portal window. The application bar displays the name of your portal and provides quick access buttons to access universal search, feedback/support, display settings and your user account.



Universal Search

The universal search tool lets you search for Automation Portal resources, including services, offerings, service folders, wiki folders, and wiki documents.

To search for Automation Portal resources:

1. On the application bar, click the **search** button ().
2. On the search dialog, enter the text of the item that you are looking for. The dialog will display a list of items that match the text that you entered. The tag on the right identifies what type of resource the item is.
3. Click on the desired item. The page for that item is opened in the Content frame.

Feedback

The feedback tool provides you with a way to send feedback to Automation Portal administrators.

To send feedback:

1. On the application bar, click the **feedback** button ().
2. In the **Comment** box, enter the feedback that you want to send.
3. Click **Submit**.

Display Settings

As an Automation Portal user, you can customize some aspects of the layout and appearance. You can switch between light and dark modes, improve the contrast between foreground and background, control where the navigation bar appears and choose an accent color.

To change your display settings:

1. On the application bar, click the **display settings** button ().
2. Select between **light** and **dark** modes.
3. Select **hi** or **low** contrast.
4. Select the **layout** of the navigation bar.
5. Select an **accent color**.

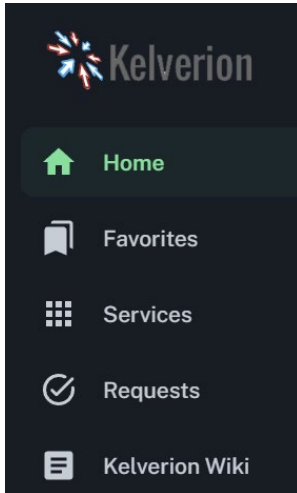
Account Profile

The account profile displays the name of the user that is connected to the Automation Portal and provides a logout option.

To log out of the portal:

1. On the application bar, click the **profile** button ().
2. Click **Logout**.
3. You are taken to the Automation Portal login screen.

Navigation Bar



The **Navigation bar** provides links that you can use to open the pages that are available to you. By default, the navigation bar appears on the left side of the portal window; however, you can also choose to display the Navigation bar horizontally beneath the Application bar.

Collapse or expand the navigation bar by clicking the < button or > button, respectively.

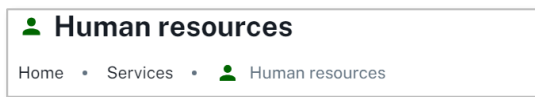
If you collapse the width of the browser window sufficiently, the navigation bar will be hidden and replaced with a navigation button in the top left corner of the portal. Clicking the navigation button opens the navigation bar as a drawer, which will close when you select a page.

Note: If you login as an administrator, the navigation bar will include a **Setup** option that can be expanded to access pages for configuring the portal and for creating and managing the services and offerings that the portal will provide.

Content View

The **Content view** is where the current Automation Portal page is displayed. When you first login to the Automation Portal the Content view will display your **Home** page. Return to the Home page at any time by clicking the **Home** button () on the navigation bar.

Many of the pages that will be displayed in the Content view include **Breadcrumb bar** that contains links that you can use to navigate the Automation Portal. Some Breadcrumb bars, especially those on setup pages, will also include buttons for tasks related to the page.



The Automation Portal is organized into six primary categories:

- The **Home** page provides a landing page for operators and administrators. The Home page provides an overview of the current state of your portal and quick access to your requests.
- The **Favorites** page displays a list of your favorite offerings.
- The **Services** page displays a list of all the services and offerings that are available to you.
- The **Requests** page displays all your requests, requests from other team members and requests that require your approval.
- The **Reports** page is available when you log in with reporter role, and provides an overview of the Automation Portal operation.

- The **Wiki** page displays wiki documents that were created to help you use the Automation Portal.
- The **Setup** page is available when you login as an administrator and provides resources and tools for managing your Automation Portal and creating and managing content.

Working With Automation Portal

Home Page

The **Home** page is the main landing page for the Automation Portal and provides administrators and operators with an overview of the portal's current operational state. Additional Home page options are available to you when you connect to Automation Portal as a user with the **administrator** role.

The home page is configurable, and you can select the information that you want to see by clicking the dashboard settings button  at edge the Home page header bar. You can select what summary items and charts that you want to display on your home page. To quickly access your requests, click **My requests** on the home page toolbar.

You can also configure the information that is displayed in the home page charts using the **Time period**, **Sort** and **Graph bars** options on the home page toolbar. The **Time period** controls how many days are represented in the information that is displayed. **Sort** determines whether the information in the charts is displayed in ascending or descending order and **Graph bars** determines how many bars are displayed.

Services and Offerings

The **Services** page provides operators with a place to access the services and offerings that are available to them. Open the services page by selecting **Services** on the navigation bar.

The service list displays the services and offerings that are available to you, based on the permissions that were configured by your portal administrator. If you do not see the service or offering that you are looking for, scroll down to retrieve more. To sort the items in the list, click on the column header – clicking multiple times will switch between ascending and descending order.

You can add one or more filters to control what services or offerings appear on the list. Filters are maintained for the duration of the current session (i.e., closing the browser clears all filters).

To add a filter:

1. On the list toolbar, click **Filters**.
2. Select the **Column** that you want to filter on.
3. Select the **Operator** that you want to filter with. The available operators are determined by the field type (e.g., string, number, date/time, etc.)
4. In the **Value** box, enter the value that you want to filter on.
5. You can add additional filters by clicking **Add filter**.

To remove a filter:

1. On the list toolbar, click **Filters**. The filter dialog appears.
2. Click the delete button (**x**) next to the filter that you want to remove.
3. To remove all filters, click **Remove all**.

To open a service, click its **name** or click the **more** button () and then select **View**. When you open a service, you will see the folders and offerings that it contains. To view the offerings in a folder, click the **more** button () and then select **View**.

Submitting Requests

As a portal operator, you can create requests for any offering that is available to you. If the offering includes markdown instructions, they will be displayed at the side of the new request page.

To Create a Request for an offering:

1. On the navigation bar, click **Services**.
2. Use the services list to find the offering that you want to submit a request for.
3. On the row of the offering, click the **more** button () and then select **New request**.
4. Fill out the request form. *You must provide values for all required fields.*
5. Click **Submit request**.

If your organization has enabled the **Stay on request** option, the request form will reset so that you can create another request for the same offering.

Request Management

The **Requests** page displays all the requests that you have created and those that were created by other operators in the same team groups that you are in. You will also see requests that are awaiting your approval. Open the Requests page by selecting **Requests** on the navigation bar.

You can quickly filter requests by state by selecting a **Status** on the request list toolbar. To sort the items in the list, click the arrow on the column header – clicking multiple times will switch between ascending and descending order. You can add one or more filters to control what requests appear in the list. Filters are maintained when you navigate away and back to the Requests page.

To add a filter:

1. On the list toolbar, click **Filters**.
2. Select the **Column** that you want to filter on.
3. Select the **Operator** that you want to filter with. The available operators are determined by the field type (e.g., string, number, date/time, etc.)
4. In the **Value** box, enter the value that you want to filter on.
5. You can add additional filters by clicking **Add filter**.

To remove a filter:

1. On the list toolbar, click **Filters**. The filter dialog appears.
2. Click the remove button () next to the filter that you want to remove.
3. To remove all filters, click **Remove all**.

The requests list provides tools for managing requests. You will have the option to close any requests that you submit and those submitted by other operators that share the same offering team groups.

To close a request:

1. On the request that you want to close, click the **more** button (⋮) and then select **Close**.

If you are in the approval group for a request's offering, you will have the option to approve or reject the request.

To approve a request that is pending approval:

1. On the request that you want to approve, click the **more** button (⋮) and then select **Approve**.

To reject a request that is pending approval:

1. On the request that you want to reject, click the **more** button (⋮) and then select **Reject**.
2. If a reason for rejecting the request is required,
 - 2.1. In the **Reason** box, enter your reason for rejecting the request.
 - 2.2. Click **Reject**.

The request list includes limited information; however, you can see more, including information assigned to request from automation runbooks, the field data that was submitted and full historical timeline.

To view the details of a request:

1. On the row of the request that you want to page, click the **more** button (⋮) and then select **View**.
2. Alternatively, you can click the request's **ID** number.

The Requests detail page is organized into three sections, **Details**, **Field Data**, and **History**.

The **Detail** section lists basic information, such as the service and offering, the date that the request was created, last updated and by whom it was requested. Note that the **Runbook owner** and **Message** properties assigned value by the runbooks that participate in processing the request. For more information, see the Kelverion Integration Pack for Automation Portal and/or Integration Module for Automation Portal User Guides.

The **Field Data** section displays the values that were entered into the request form when it was submitted. The **History** card provides a timeline of the request, from when it was created to when it was closed and all the updates in between, including integration calls.

Reports

Automation Portal Reports are available for operators that have also been configured with the Reporting role. Operators that can access reports can view reports data for all users in the organization. The **Reports** page provides report groups for different areas of the Automation Portal.

Requests by Status

In the Reports page, you can open the **Requests by Status** report by clicking on **Reports > Request reports > Requests by status**. This report presents a breakdown of all portal requests, grouped by their status. The report is structured in two distinct sections – the **Status** section and the **Request List** section.

Status: All	
All	6
Approved	1
Closed	3
Complete	0
Failed	0
In progress	0
New	1
Pending	1
Rejected	0

The **Status** section provides a list of request statuses, with corresponding request count for each status. Selecting any status in this section will filter the results in the **Request List** section to display requests with the selected status.

For example, selecting **Approved**, will display requests with status Approved, and selecting **Closed** will display requests that have been closed. Selecting **All** will display all requests.

In the report toolbar, you can use the **Time Period** filter to adjust the reporting window between one day and one year into the past. For example, selecting 30 days will only display requests and status aggregation from the past 30 days.

You can further filter the results in the request list by using specific request filters.

To add a filter:

1. On the list toolbar, click **Filters**.
2. Select the **Column** that you want to filter on.
3. Select the **Operator** that you want to filter with. The available operators are determined by the field type (e.g., string, number, date/time, etc.)
4. In the **Value** box, enter the value that you want to filter on.
5. You can add additional filters by clicking **Add filter**.

To remove a filter:

1. On the list toolbar, click **Filters**. The filter dialog appears.
2. Click the delete button (**x**) next to the filter that you want to remove.
3. To remove all filters, click **Remove all**.

The **Export** button on the request list toolbar allows you to export the current request list to a CSV file.

To export report requests:

1. Configure the report filters to display desired request data.
2. On the list toolbar, click **Export**.
3. A report RequestByStatusReport zip file will be downloaded to your machine.
4. In the zip file you will find a RequestReport.csv file containing the report requests.

Wiki Page

The **Wiki page** provides operators with information that Automation Portal administrators and developers have compiled to help you both use the portal and the services and offerings that it contains. Open the Wiki by selecting **Wiki** on the navigation bar. Note that the name that you see on the navigation bar may be different as it can be customized for your instance.

The wiki page lists the folders and documents that are contained in the wiki. Folders are used to organize collections of related wiki documents. To sort the items in the list, click the arrow on the column header – clicking multiple times will switch between ascending and descending order. You can add one or more filters to control what wiki items appear in the list. Filters are maintained when you navigate away and then back to the wiki page.

To add a filter:

1. On the list toolbar, click **Filters**.
2. Select the **Column** that you want to filter on.
3. Select the **Operator** that you want to filter with. The available operators are determined by the field type (e.g., string, number, date/time, etc.)
4. In the **Value** box, enter the value that you want to filter on.
5. You can add additional filters by clicking **Add filter**.

To remove a filter:

1. On the list toolbar, click **Filters**.
2. Click the **remove** button (x) next to the filter that you want to remove.
3. To remove all filters, click **Remove all**.

You can open a wiki folder or document by clicking its **Name** or by clicking the **more** button (:) and then selecting **View**. Opening a wiki folder displays a list of the folders and documents that are contained in the folder. Opening a wiki document displays details about the document and its content of the document.

Support and Guidance

If you require any support or guidance with deploying the portal and integrating it with your automation tool, our professional services team are ready to help.

Please contact your local sales representative who can organize a services support engagement.

Sending Feedback

If you encounter a problem while working with the Automation Portal or have an idea for making the Automation Portal even better, we would like to hear from you.

You can send us an e-mail at support@kelverion.com

We look forward to hearing from you.